Board of Trade Journal

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Contents PAGE

Britain's Exports in May Exceeded Pre-war Volume ... 809
Warehouses Go Back to Industry 812
Progress in Reconversion and Civilian Industrial Expansion 813
Restrictions on Export of Textiles 814
Questions in Parliament ... 815
Industrial Teams' Reports on Germany 818
Possible Developments of Trade Between Egypt and Great Britain 821
Purchase of Rubber from the Far East 824

Contents PAGE

Wholesale Prices in the Netherlands 825
Conditions in Canadian Pulp and Paper Industry 826
Development of Palestine Trade in 1945 827
Conditions in French Leather Industry 829
Canada's External Trade in March 833
Eire Customs Tariff Modification 834
Forthcoming Exhibitions and Fairs 840

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Britain's Exports in May Exceeded Pre-War Volume

MAY was the first month in which the volume of exports of United Kingdom goods was higher than before the war. The rise over the 1938 average was no less than 15 per cent. This is partly due to a real expansion in exports and partly to May having the maximum number of working days, there being only four Sundays in a 31 day month. This high volume cannot be expected to be repeated in June, though it should be for July. There are five Sundays in June and with the two public holidays, the number of working days will be four fewer than in May, being in fact smaller than in either February or April.

Exports in May amounted to £85·2 million, an increase of £15·8 million on April, about half of which was due to the longer month. Taking 26 days (excluding Sundays) as a normal month, the rate of exports has risen as follows during this year :— 55, 65, 67, 75 and 82 million £ respectively. The May figures thus show a continuance of the fairly steady rate of increase of 10 or 11 per cent. per month shown by the figures for the earlier months of 1946.

Notable Increases

The greatest expansion continues to be in metal goods, notable increases being recorded for motor vehicles, locomotives and machinery, exports of all being higher, and for motor vehicles and locomotives very much higher than before the war.

Imports in May (£115·9 million) were the highest since the end of the war, two-thirds of the increase of £18·0 million compared with April being due to the longer month. Re-exports amounted to £3·6 million, the principal items being rubber (£491,000), tea (£360,000), undressed furskins (£304,000) and refined petroleum (£234,000). The value of retained imports in May (£112·3 million) was £22 million higher than the average for the first four months of the year, of which only £7 million was due to the longer month. Raw materials rose by £10·2 million (40 per cent.), food, drink and tobacco by £9·5 million (21 per cent.) and manufactured articles by £2·1 million (13 per cent.).

Detailed particulars of our imports, exports and re-exports in May were published on June 24*. The table on page 811 shows the summary figures for retained imports and British exports.

The figures for 1945 exclude munitions, i.e. aircraft and other vehicles and parts (except tyres and tubes for road vehicles) and arms, ammunition and military and naval stores imported or exported by Government Departments. Imports of these have been negligible throughout this year and exports very small, so that the figures given in the table are substantially comparable throughout.

Supplies for Relief

The export figures also include supplies for relief and rehabilitation in liberated areas. No precise figures are available for these, but they are roughly estimated at £4·5 million in May and a little less in April.

A comparison of the May figures with those for March, which had only one less working day, probably affords the best indication of the progress of our export trade. Exports were £18 million (27 per cent.) higher than in March, the rise being almost entirely due to an increase of nearly one-third for manufactured articles. Exports of food, drink and tobacco rose by £1 million (one-fifth), but this was largely offset by a small decrease for raw materials and a reduction of nearly one-quarter in the value of exports by parcel post.

The quantity of spirits exported rose above the 1938 average for the first time since the end of the war, the rise being nearly one-fifth and applying to a large number of markets in addition to the United States which, as usual, took between 40 and 50 per cent. of the total. Exports of potatoes were eight times the pre-war figure, mainly as a result of the large shipments to Germany (27,000 tons.) The quantity of refined sugar exported, though more than two and a half times the low March figure was

Exports of Spirits

* Accounts relating to Trade and Navigation of the United Kingdom, May 1946. H.M.S.O., price 4s. 6d. ; by post, 4s. 9d.

only half the pre-war average,

The amount of coal exported (370,000 tons) was the smallest on a daily average basis since last August, the markets most affected being France and Denmark. Other changes in the raw material groups were small, apart from a seasonal reduction in seeds for sowing.

Exports of Metal Goods

The major increase in May, as in earlier months of this year, was in respect of metal goods; these showed a rise to £38·9 million from £27·7 million in March, the increase being shared by all groups except cutlery, hardware, etc., which remained unchanged. Metal goods have now risen to 46 per cent. of the total. Vehicles replaced machinery as our largest group of exports, rising from £6·9 million to £10·9 million or 13 per cent. of our total exports. Exports of machinery were nearly as large, £10·5 million, and showed a rise of £3·1 million.

Exports of motor cars rose steadily during the first four months of the year at the rate of 1,000 per month; the longer month accounted for the rather larger increase in May, 5,622 as against 4,343 in April. The number of motor car chassis exported has recently shown a great expansion, the figures for the past three months being 1,113, 1,408 and 2,294. Exports of commercial vehicles and chassis advanced at the same rate as motor cars up to March, but at a rather less rapid rate since, the May figure of 4,886 comparing with 3,496 in March. Railway rolling stock and parts exported in May amounted to 42,000 tons, compared with an average of 11,000 tons in 1938; the greatest expansion was in wagons and trucks to six times the pre-war figure. A rise of £0·5 million for aircraft and parts was mainly due to large exports of aircraft parts other than engines, to France.

The tonnage of machinery exported rose sharply in May and for the first time since the war exceeded the 1938 average, the rise being 23 per cent. The pre-war figures were exceeded for machine tools (almost double), cranes, hoists, etc. (by two-thirds) and electrical machinery (by one-third); for internal combustion engines and boilers and boiler house plant the 1938 figures were about equalled but textile machinery was less by one-fifth. Exports of machinery in May included supplies to Russia valued at £0·6 million, of which half was represented by electrical machinery. For practically all descriptions of electrical goods and apparatus exports were higher than before the war, but the most marked expansion was shown for wireless receiving sets, the number of sets exported last month being 31,000 against only 7,000 a month before the war. The rise in these exports has been continuous throughout the year rising from 6,000 in January to 14,000 in March and 15,000 in April.

Exports of iron and steel goods, which had been roughly £6·0 million in each of the first four months of the year, rose to £8·7 million. The quantity exported was 256,000 tons, as against 160,000 tons in 1938. Increases were threefold or more for ferro alloys, bars and rods, angles, shapes and sections, and plates and sheets ⅛th in. thick and over, while exports of wrought tubes and railway material more than doubled. There were, on the other hand, very marked reductions for tinned plates and galvanized sheets. Exports of most non-ferrous metals were higher than in 1938, but the greatest expansion was recorded for tin, exports of which were 3,405 tons, against 1,024 tons, due mainly to heavy shipments to the United States and India.

Exports of Textiles

Exports of textiles in May (£16·6 million) were the highest both by value and by volume since the end of the war, but of the three divisions of manufactures, textiles showed the smallest rise (23 per cent.) compared with March. Though the value was double the 1938 average, the volume was below the pre-war level, thanks largely to a great reduction for cotton piece goods. Exports of these in May were maintained at the average for earlier months of the year, about 40 per cent. of 1938. The value of cotton yarns and manufactures exported in May was higher than in earlier months as a result of rather larger exports of some of the fully manufactured goods such as handkerchiefs. All the textile groups recorded a higher value of exports in May than in any month since the end of the war. The most marked increase in value compared with recent months was in respect of apparel, though the rise in relation to 1938 was larger for silk and rayon goods. One-third (£778,000) of our exports of apparel went to Denmark in May, exceeding our total exports to that market in the period January to April.

While many items contributed to the rise of £1·2 million compared with March, the principal increase was (as in April) for women's and girls' outer garments. Relief supplies of apparel were comparatively small in May, about £55,000 against an average of about £250,000 for earlier months of this year. Exports of woollen and worsted tissues were equal to the pre-war average, and rather higher than in recent months owing to larger relief supplies. Those of rayon piece goods were about the same as recently and double the 1938 figure, but the most marked advance has been in piece goods wholly of silk, which were four times the small 1938 average, the value being about £500,000. Though total exports of linen piece goods were one quarter lower than in 1938, those to the United States rose by one-half to almost precisely 50 per cent. of the total.

Other Manufactures

The value of the exports of all other manufactures rose from £14·9 million in March to £18·4 million in May, the rise being general. The principal increases in value were for miscellaneous manufactures (£1·0 million), pottery, glass, etc. (£0·7 million) and chemicals, drugs, etc. (£0·5 million). The March figure for the last mentioned group was inflated by relief shipments of disinfectants, insecticides etc., to Burma and Malaya, and apart from this the rise for chemicals, drugs, etc. was spread throughout the remainder of the group, exports being mostly greater than in 1938. Books, hard haberdashery, perfumery and toilet preparations and practically all other items contributed to the marked rise for miscellaneous manufactures, but whereas exports of perfumery and toilet preparations were three times the 1938 figure, and there was an even greater expansion for synthetic resins, exports of books showed a reduction of three-fifths. Among the other groups exports of asbestos manufactures, plate and sheet glass and cement were roughly double those in 1938, and those of lubricating oil trebled.

Food and Tobacco Imports

The value of retained imports of food, drink and tobacco in May (£55·7 million) was 45 per cent. above last year's average, and was the highest value figure recorded for over 25 years. The outstanding increase, compared with the preceding months of the year, was for miscellaneous foods, imports of which were double the monthly average for 1945; the sharp rise compared with recent months was more than accounted for by heavy imports of sugar (partly seasonal), the quantity imported in May (246,000 tons) being one-quarter higher than in 1938, and the highest monthly figure for over 12 years. The value of the sugar imported in May (£5,448,000) was over one tenth of the total imports of food and drink. The quantity of grain and flour imported was about the same as in April, but considerably higher than in earlier months of this year. Canadian supplies of wheat in May (318,000 tons) were one-quarter above the average for the first three months of the year, when imports were low owing to the freezing of the St. Lawrence, but total imports of wheat were 15 per cent. lower than in 1938.

Imports of meat (132,000 tons) were about equal to the figures for January and March. Supplies from New Zealand (mainly lamb) have become of increasing importance, representing nearly half the total meat imports in May as against one-third in April and only one-eighth in the first quarter of 1946.

Among the principal items of dairy produce, retained imports of butter (27,000 tons) were the second highest for about five years, and only one-third below the 1938 average; while over half the imports came as usual from New Zealand, Denmark supplied one quarter last month. Retained imports of dried eggs (3,900 tons) were the highest since August 1945, but there was an offsetting reduction for shell eggs, imports from Canada—our largest source of supply so far this year—being very small in May.

There was a further seasonal reduction in imports of oranges, the May figure (3,600 tons) being under one-tenth of the normal pre-war importation at this time of the year. Imports of bananas were the highest of any month this year, representing one-third of the value of all imports of fruit and vegetables. Further heavy supplies of Egyptian onions (15,000 tons) were received in May, the quantity being rather greater than before the war.

The quantity of tobacco imported was slightly above the average for earlier months of this year, and one quarter

(*Continued on next page*)

Retained Imports and United Kingdom Exports

Class and Group	Retained Imports				United Kingdom Exports			
	Monthly Average 1945	March 1946	April 1946	May 1946	Monthly Average July-Dec. 1945	March 1946	April 1946	May 1946
	£000	£000	£000	£000	£000	£000	£000	£000
I.—Food, Drink and Tobacco—								
A. Grain and flour	6,399	7,017	9,297	8,463	140	519	497	313
B. Feeding-stuffs for animals	243	41	89	15	5	11	66	93
C. Animals, living, for food	1,049	926	934	632	—	—	—	—
D. Meat	8,960	13,083	7,922	12,844	43	57	67	106
E. Dairy produce	6,230	10,217	8,586	10,648	259	95	174	144
F. Fresh fruit and vegetables	1,328	2,668	2,524	1,699	104	659	326	448
G. Beverages and cocoa preparations	4,062	4,807	2,967	4,383	1,330	1,347	1,047	2,227
H. Other food	5,993	9,715	10,741	11,850	1,766	1,051	1,218	1,284
I. Tobacco	4,142	4,598	5,028	5,200	1,134	1,703	1,525	1,788
Total, Class I	38,406	53,072	48,088	55,734	4,781	5,442	4,920	6,403
II.—Raw Materials and Articles mainly Unmanufactured—								
A. Coal	—	—	—	—	763	861	876	720
B. Other non-metalliferous mining and quarry products and the like	625	915	1,631	1,740	74	115	85	129
C. Iron ore and scrap	1,287	1,832	1,694	1,952	1	0	3	0
D. Non-ferrous metalliferous ores and scrap	1,704	1,640	1,218	1,884	4	11	7	33
E. Wood and timber	3,780	2,536	2,412	2,615	14	38	37	52
F. Raw cotton and cotton waste	3,889	3,373	3,713	5,405	10	35	95	65
G. Wool, raw and waste, and woollen rags	2,425	1,991	1,482	4,554	120	580	583	534
H. Silk, raw and waste, and artificial silk waste	173	73	32	30	110	210	106	143
I. Other textile materials	1,038	1,016	939	1,046	2	1	3	56
J. Seeds and nuts for oil, oils, fats, resins and gums	3,843	5,721	6,545	5,409	142	205	199	320
K. Hides and skins, undressed	1,186	2,180	1,862	2,224	68	246	383	322
L. Paper-making materials	1,308	545	820	1,921	20	32	36	50
M. Rubber	906	2,224	3,053	5,129	41	75	73	60
N. Miscellaneous raw materials and articles mainly unmanufactured	1,183	1,624	1,346	1,754	164	677	745	469
Total, Class II	23,347	25,670	26,747	35,663	1,533	3,086	3,231	2,953
III.—Articles Wholly or Mainly Manufactured—								
A. Coke and manufactured fuel	—	—	—	—	61	73	81	69
B. Pottery, glass, abrasives, etc.	77	85	66	103	1,231	2,039	2,074	2,693
C. Iron and steel and manufactures thereof	514	475	552	826	2,463	6,499	6,689	8,713
D. Non-ferrous metals and manufactures thereof	1,437	1,155	1,978	1,833	1,049	2,066	3,990	3,732
E. Cutlery, hardware, implements and instruments	468	299	205	204	901	2,253	2,053	2,283
F. Electrical goods and apparatus	1,552	82	114	162	1,282	2,851	2,561	3,573
G. Machinery	1,614	1,328	868	1,104	4,167	7,459	7,867	10,544
H. Manufactures of wood and timber	1,134	704	944	892	57	127	140	133
I. Cotton yarns and manufactures	149	38	84	88	3,502	5,065	5,245	5,699
J. Woollen and worsted yarns and manufactures	128	101	133	126	1,782	3,448	3,124	4,043
K. Silk and artificial silk yarns and manufactures	212	74	26	37	1,371	2,300	2,227	2,641
L. Manufactures of other textile materials	616	818	1,077	1,187	730	1,439	1,647	1,772
M. Apparel	397	84	87	251	1,227	1,224	1,957	2,415
N. Footwear	61	97	30	80	125	192	202	259
O. Chemicals, drugs, dyes and colours	1,518	1,524	1,601	1,731	3,495	5,794	5,013	6,257
P. Oils, fats and resins, manufactured	11,988	8,054	6,625	6,670	281	529	406	847
Q. Leather and manufactures thereof	363	410	711	471	174	352	392	519
R. Paper, cardboard, etc.	959	542	856	1,110	458	1,095	1,032	1,305
S. Vehicles (including locomotives, ships and aircraft)	359	246	124	175	1,958	6,934	7,654	10,939
T. Rubber manufactures	5	2	2	1	81	327	381	492
U. Miscellaneous articles wholly or mainly manufactured	673	1,238	793	1,433	1,911	4,010	4,293	4,981
Total, Class III	24,224	17,356	16,876	18,484	28,306	56,076	59,028	73,909
IV.—Animals, not for Food	328	513	299	401	83	281	191	237
V.—Parcel Post	1,260	2,232	2,089	1,978	1,839	2,173	1,993	1,696
TOTAL, ALL CLASSES	87,565	98,843	94,099	112,260	36,542	67,058	69,363	85,198

higher than in 1938. The rise for imports from the United States was no less than 50 per cent., the value of the imports from this source being £4·6 million.

Imports of Materials

Retained imports of raw materials were the highest, by value, for more than 20 years. The increase compared with the preceding months of the year was essentially due to larger imports of rubber, cotton and wool. The quantity of rubber imported (41,000 tons) was the highest ever recorded in a single month, being three times the average for 1938. There were abnormally high shipments from Malaya, but included in the total was nearly 4,000 tons of synthetic rubber from the United States. Re-exports of rubber (3,000 tons) were the same as in 1938.

Retained imports of cotton (49,000 tons) were almost double the average of the previous four months, and exceeded the pre-war figure by one-tenth. Our principal source of supply so far this year has been Brazil, which provided a quarter of the total, whereas in 1938, Brazil

(*Continued on next page*)

HOME NEWS SECTION

Warehouses go back to Industry

DEREQUISITIONING is now complete of the last 40 warehouses (representing 2,000,000 square feet of storage space) set up and conducted by the Board of Trade during the war for the dispersal of tobacco from docks and other areas vulnerable to enemy bombing.

Decided upon in July 1941, a simple dispersal scheme was quickly in operation. Groups of "scatter" warehouses were converted from industrial space. Mills were requisitioned in Yorkshire and Lancashire, tinplate works in South Wales and factories not then wanted for civilian production in Scotland, Worcestershire and Middlesex.

Forwarding agents and managers for each group of warehouses were selected from experts. A tobacco merchant gave his services as technical supervisor. H.M. Customs and also tobacco manufacturers modified their peacetime requirements to ensure that the services would be carried out with the same speed and economy as before the war. Within two months, consignments of tobacco were being taken from ship to warehouse, weighed, stored and delivered when wanted to tobacco manufacturing companies, who bought the tobacco and paid for these services.

From September 1941 to September 1945, between 40 per cent. and 50 per cent. of the total importations of American whole-leaf tobacco into this country were warehoused. Over 445,000 tierces and 33,500 cases, weighing 186,400 tons, were handled, the duty value of the tobacco being £700,000,000.

Although the work was carried out under wartime difficulties, losses from theft, damage or any cause, in transit or in warehouses proved negligible.

Britain's Exports in May

(*Continued from previous page*)

was fourth, after the United States, Egypt and India. Retained imports of wool were abnormally low in April, but the May figure (25,000 tons) was the highest since last August, and just exceeded the pre-war average.

The amount of wood-pulp imported in May (81,000 tons) was considerably higher than in recent months as a result of the re-opening of the Baltic, imports from Sweden and Finland accounting for three-quarters of the total for the month; imports so far this year amount to less than two-fifths of those in 1938. Imports of paper, cardboard, etc. rose by almost one-half, compared with the average of January-April, but even so, they were only one-third of pre-war.

The value of imports of oil seeds, oils, etc., was the lowest since February, largely as a result of the cessation, in May, of imports of groundnuts from India, owing to the prohibition on export from that country. As in April, last month's total included a substantial importation of whale oil (19,000 tons in May, valued at £0·9 million).

The value of imports of non-metalliferous mining and quarry products in May included £1·0 million in respect of diamonds (mainly industrial), though the whole of the imports are not yet being recorded; a similar amount was included in the April figures.

The quantity of iron ore imported was two-fifths above the 1938 average, but imports of iron and steel, though one-half greater than in earlier months of the year, amounted to only 45 per cent. of pre-war. Imports of copper were two-fifths below those in 1938, but since there were considerable re-exports before the war and none in May, the reduction in retained imports was only one-sixth. Imports of machinery remained small, amounting to only two-fifths of the 1938 quantity.

As in April, refined petroleum represented rather more than one-third of the total value of imports of articles wholly or mainly manufactured. Though the quantity imported in May (275 million galls.) was much the same as the average for the four preceding months, imports of motor spirit were reduced to only half the pre-war amount; imports of other descriptions, on the other hand, were more than double those in 1938.

"Utility" Government Surplus Furniture

ON March 19 the Board of Trade published a list of items to be included in the range of G.S.S.R. "Utility" furniture and additional items were announced on May 15.

The Ministry of Works has now disposed of:—

Suffolk Chairs (65 *arm*, 260 *small*) to
S. Wiseman, Ltd., High Wycombe;
C. G. Lincoln, Ltd., Bristol;

Circular Occasional Tables (1,500) to
Moorhouse (Apex) Ltd., Elton, Bury;
Messrs. Joseph Whiting & Son, Bristol;
Messrs. Uphill Cabinet Co., Weston-super-Mare.

Unit values have been fixed at:—

Chairs	1 unit
Tables	2 units

Retailers are reminded that the Board of Trade are authorizing the above firms to supply these goods without the surrender of units at the time of purchase. The units collected in each month should be sent back, on or before the 7th of the following month, to the firms from which retailers purchased the furniture.

The Orders which fix the unit values of these items of furniture and the Direction requiring retailers to pass back the units they received for it to the firm from which they bought it are:—

The Utility Furniture (Supply and Acquisition) (No. 8) Order, 1946, S.R. & O. No. 549;
The Utility Furniture (Supply and Acquisition) (No. 9) Order, 1946, S.R. & O. No. 861.
Directions, dated May 13, 1946, relating to delivery of units in respect of reserved utility furniture, S.R. & O., 1946, No. 676.

New Utility Clothing Price Schedules

The Board of Trade have issued the Utility Apparel (Maximum Prices and Charges) (No. 4) Order, 1946 (S.R. & O. 872/46). This Order, which comes into force on Monday, July 1, provides for five new related schedules to the Utility Apparel (Maximum Prices and Charges) Order, 1945.

Two of the Schedules, No. 1D (Men's, Youths' and Boys' Outerwear) and No. 3D (Women's and Maids' Outerwear), replacing No. 1C and No. 3C respectively, contain new distributors' prices necessitated by the issue of new Directions for manufacturers. The new Directions, S.R. & O. 794/46 (Men's Outerwear) and S.R. & O. 795/46 (Women's Outerwear) came into force on June 11, 1946.

A further two Schedules, No. 2D (Men's, Youths' and Boys' Shirts, Underwear and Nightwear) and No. 15A (Corsets and Brassieres), replacing No. 2C and No. 15 and Supplement No. 1 thereto respectively, contain new distributors' prices necessitated by the issue of new manufacturers' Directions S.R. & O. 886/46 (Men's Underwear) and S.R. & O. 876/46 (Corsets). S.R. & O. 886/46 comes into force on June 28 and S.R. & O. 876/46 on July 1 next.

The fifth Schedule, No. 4E, replacing No. 4D, contains distributors' prices for Women's and Maids' Underwear and Nightwear. The provisions of this Schedule reflect these in new manufacturers' Directions for Women's and Maids' Underwear and Nightwear which will be issued shortly. The related schedule has been issued in advance to save separate amendment to the Utility Apparel (Maximum Prices and Charges) Order. The main changes in this schedule are the introduction of a new nomenclature for sizes, the inclusion of garments made from new cloths, and the listing of separate maximum prices for long sleeved and short sleeved nightwear and for panties and briefs. There is also a provision for an increase in the maximum prices of certain garments when trimmed with lace or embroidery. In the Directions it will be stipulated that a certain minimum value of lace or embroidery must be added to these garments before the manufacturer may take advantage of the higher ceilings.

Progress in Reconversion and Civilian Industrial Expansion

PROGRESS in reconversion of industry and expansion of civilian production in a selection of engineering and consumer goods industries is shown in the following notes :—

Heavy Electrical Plant

Export orders approved during April amounted to £363,730, primarily for Australia and Finland, bringing the total for 1946 up to £1,966,315.

Railway Carriages and Wagons

Export orders include one from the South African Railways for twelve air-conditioned saloon coaches for the Royal Tour of South Africa next year.

Private Cars

Production of private cars averaged 175 per month in 1944 and 600 per month during January-August, 1945. Thereafter output rose to 6,904 in December, 1945, and 1946 figures are :—

January	6,319
February	10,701
March	12,419
April	15,348

Nearly 48 per cent. of the production in April was for export, although, because of the time lag between production and shipment, only 5,751 cars were actually exported.

Clocks and Watches

Production during 1946 has increased as follows :—

£1,000s

	January	*February*	*March*	*April*
Electric clocks	32·3	45·7	55·9	94·1
Mechanical clocks	25·9	22·7	43·8	61·3
Watches ...	8·2	5·9	4·0	10·0

About 12 per cent. of electric clock production and 33 per cent. of mechanical clock production was for export.

Household Textiles

The production of furnishing fabrics was prohibited except under licence in 1942 to conserve supplies of essential textiles. To meet the needs of priority classes such as bombed-out and newly-married people production of a range of utility upholstery cloth and utility curtain cloths was begun in 1944. Since then production has moved as follows :—

'000 *square yards annual rates*

	1944	1945	1945 *September October*	1945 *November December*	1946 *January February*
Utility Upholstery	556*	1,195	1,380	1,822	2,394
Utility Curtaining	No production.	8,263	12,126	7,908	7,566

Production of utility upholstery is reserved exclusively for utility furniture production and of curtain cloths for priority docket holders. It is hoped to expand production of both items during 1946 to meet the increased demand resulting from demobilization.

Production of sheets, pillowcases, cotton blankets, towels, is dependent on allocations of cotton yarn. These have been increased since last November and production should rise fairly steadily. The most notable increase to date has been in pillowcases. The annual production rate for January-February, 1946, was 13,428 compared to 10,386 for September-October and 11,778 for November-December, 1945.

Mattress supplies are severely hampered by the shortage of ticking. Returning labour is being absorbed by making more elaborate types such as spring interiors which do not take much extra material. About 50 per cent. of the cloth allocated for mattress production generally has been Government surplus cloth.

Production '000s.

	1943	1944	1945	*February-March* 1946
Cot mattresses	384	421	399	408 (annual rate)
Adult „	2,435	2,516	2,074	2,286 „ „

In 1943 Government orders took 51 per cent. of bedding supplies and in 1944, 36 per cent. The proportion is now negligible.

* Production begun July, 1944.

Utility Furniture

The increase in utility furniture production has been very rapid in the last few months, as shown by the following figures :—

'000 *Units*

1945 *June*	1945 *December*	1946 *January*	1946 *February*	1946 *March*
1,164	1,991	2,631	2,638	3,024

In March, 1946, there were 33,459 workers employed on utility furniture compared to 13,509 in June, 1945.

Perambulators and Push Chairs

Production in April, 1946, was more than 53 per cent. above the average for October-December, 1945. Comparative figures are as follows :—

Monthly rates '000s

	1945 *October-December*	1946 *January*	*February*	*March*	*April*
Prams and Folders	28·2	35·2	36·1	44·3	43·2
Push Chairs	22·4	23·2	23·9	33·4	37·3

These figures compare with a production of 36,000 per month of both types in 1935.

There are at present some sixty old-established firms and some twenty newly licensed firms engaged in manufacture. The supply of wheels, recently a serious bottleneck, is now improving somewhat, and there has been a slightly increased allocation of plywood, one of the chief bottlenecks to increased production. Exports have risen from under 5 per cent. in 1945 to 11 per cent. in March, 1946.

Leather Goods

By February 1946 all forms of quota restrictions instituted during the war had been removed, but shortages of raw materials such as leather, textiles, fibre board and vulcanized fibre prevented old-established manufacturers from developing to the full extent of their capacity. A notable rise in production for export is shown by the following table :—

Leather Goods (Annual Rate)

Period	*Total Production Value*	*Export Value*	*Export Percentage*
February-July, 1945	£7,598,000	£703,400	9·2 per cent.
August-October, 1945	£6,888,000	£1,052,000	15·2 „
November, 1945-January, 1946	£7,844,000	£1,424,000	18·1 „

About half of the 160 factories closed by the policy of concentration during the war have been re-opened.

Domestic Pottery

Total production of domestic pottery increased by more than 25 per cent. during the period July, 1945-March, 1946, and there was a considerable expansion of home-market and export supplies at the expense of Government orders. The following table illustrates this :—

Production (Annual Rates) £'000s

	1945 *July-September*	1945 *October-December*	1946 *January-March*
Total	9,656	10,716	12,164
Government	736	512	412
Home	5,108	5,784	6,084
Export	3,812 (39%)	4,420 (41%)	5,668 (47%)

The labour force increased from 24,559 to 29,670 during the period June 1945-March 1946, though it is still only 60 per cent. of the 1935 figure of nearly 50,000. The rising demand of the building trade has created a shortage of plaster for making moulds, but every effort is being made to get sufficient supplies for the domestic pottery industry.

Cutlery

The main difficulty in this industry has been the shortage of labour but the position has to some extent improved in recent months. The total of 7,732 at the end of March 1946 is more than one-third greater than the total at the end of June 1945. The production value of controlled cutlery increased from £727,000 during the quarter July-September 1945, to £1,078,000 for the quarter January-March 1946.

(*Continued on next page*)

Restrictions on Export of Textiles

MR. H. A. MARQUAND, Secretary for Overseas Trade, speaking at the annual general meeting of the Mantle and Costume Manufacturers' Export Group in London on Tuesday, said that though our exports as a whole were now running at the rate above the 1938 volume, the greater part of the increase was accounted for by metal goods of all kinds and by chemicals.

The export of textiles of all kinds were barely three-quarters of what they were in 1938 and as far as cotton goods were concerned they did not reach 40 per cent. of 1938. The world demand for textiles was very far indeed from being satisfied. Indeed it was so keen that we were obliged to impose severe restrictions upon export so as to ensure that the bulk of our production was kept for the home consumer. It was sometimes said—and said too often by shopkeepers to their customers—that sufficient goods were not available in the shops because so much was being exported. The exact opposite was true. Many of the goods now in the shops would not be there at all unless we could export other goods to pay for them or for the raw materials from which they were made. As for clothing and textiles, they had had to maintain restrictions on export in order to make the increased issue of clothing coupons which had recently been announced.

The Government were anxious to increase the supply of textile goods to foreign countries who sent us food. They wanted to grant in future even more clothing coupons to the home consumers. What prevented them was not shortage of wool or cotton. They had plenty of both. What was lacking was labour in the mills, especially in the cotton mills.

The shortage of yarn for making cloth was due to shortage of labour. While this persisted the restrictions on export must remain. The Government had no wish to retain them a moment longer than was necessary. Already they had modified them considerably so as to give some freedom to exporters to choose their own markets and so as to give at least a small share of the trade in woollens to those who had not exported in the years before the war.

They must plan now for the time when shortages had disappeared and when freedom of choice had been restored to the consumer. He hoped that the nations of the world would agree to plan together for full employment. If they could successfully maintain effective demand for goods throughout the world they might avoid or greatly mitigate international depressions and prevent a disastrous resort to dumping or restrictive trade barriers in the future. But even if that could be achieved there would still remain for individual British industries the necessity of ensuring that the goods they were producing were the goods which their overseas customers wanted and for which they were ready to pay.

In general there had been a marked tendency before the war for a decline in the volume of export from Britain of raw materials, semi-finished goods and the cruder finished products of industry, accompanied by some improvement in the export of more highly finished goods and of more refined products for the final consumer.

It was to be expected that such a trend must continue. It was therefore reasonable to look forward, once immediate shortages had been overcome, to an increase in the exports of clothing and other made-up textile goods. In preparation for such a development he urged the Group to make sure that their services to consumer research and advertising were adequate for the purpose.

Progress in Reconversion

(*Continued from previous page.*)

The most notable increase was in production of scissors which rose from 421,000 to 1,139,000 per quarter during the same period, while table and desert knives rose from 3,177,000 to 4,333,000, and spoons and forks from 7,764,000 to 9,539,000.

Safety Razors, Blades and Parts

During the war this industry was severely handicapped by diversion of production to munitions work and withdrawal of labour. Exports were greatly reduced and there was considerable difficulty in meeting the demands of the Services and home civilian population. The position has now greatly improved; the labour force increased from 2,151 to 3,384 between June 1945 and March 1946, and the production value from £252,000 per month in April-June 1945 to £392,000 per month in January-March 1946. Notable increases have been in the sales of safety razor holders which rose from 279,000 to 843,000 per month and razor blades which rose from 67,356,000 to 89,518,000. Efforts are being made to expand export production and a target of 30 per cent. has been set for the industry.

Further Relaxation of Rubber Controls

THE remaining prohibitions or restrictions on the use of natural and special purpose synthetic rubber for the production of certain articles and component parts are removed by the Control of Rubber (No. 26) Order, 1946, issued by the Board of Trade with effect from June 29. General purpose synthetic rubber (GR-S) was freed from these restrictions last October.

As stated then this relaxation does not mean an immediate increase in the range of articles which can be made for the home market. Hitherto the use of these materials has been prohibited for a wide range of goods which could not be regarded as essential, but improvement in supplies, particularly of natural rubber, and the freeing of capacity from war orders now makes it possible to relax this restriction. The Board of Trade will still remain the sole importers and distributors of natural and synthetic rubber and they will now be prepared to release reasonable quantities for incorporation in goods for the export market. For the time being, however, and until greater capacity becomes available, it will not be possible to extend the range of articles which can be made for the home market to any considerable extent.

Further enquiries in regard to this matter should be addressed to the Rubber Directorate of the Board of Trade, Empire House, St. Martins-le-Grand, London, E.C.1.

Copies of the new Order can be obtained from H.M. Stationery Office, York House, Kingsway, London, W.C.2, or through any bookseller, price 1d. net (S.R. & O. 1946 No. 868).

Allocations of Elastic

The Board of Trade announce that following the suspension of the allocation systems for woven wool and non-wool utility cloths and knitted rayon underwear fabrics no further allocations of braid elastic will be made. The present system will, however, be continued for the time being for registered hosiery manufacturers.

Makers up should not apply to the Board of Trade or to the Directorate of Narrow Fabrics for supplies of braid elastic, but should make the necessary arrangements with their normal suppliers.

It should be understood that although supplies of the materials used in the manufacture of elastic have improved and production is increasing, makers up may not at present be able to get all they require.

Board of Trade Appointment

The President of the Board of Trade, with the approval of the Prime Minister, has appointed Mr. H. J. Hutchinson, C.B., C.B.E., to be Second Secretary of the Board.

Under the Secretary, Mr. Hutchinson will be responsible for the work of the Departments and Divisions of the Board concerned with industry and home trade, and raw materials.

The appointment is additional to that of Sir Percivale Liesching, K.C.M.G., the Second Secretary responsible under the Secretary for the Departments and Divisions dealing with overseas trade matters.

Shipping Casualty Returns

The Liverpool Underwriters' Association has issued a classified return of casualties to motor and steam vessels of 500 tons gross register and upwards of all nationalities which have been posted in the Loss Book during the month ended May 31, 1946. These returns are compared with similar periods for the years 1943 to 1945.

In May 1946, 11 total losses of motor and steam vessels were shown. These amounted to a gross tonnage of 35,817 of which three were British totalling 7,241 gross tons.

In May 1945, there were four total losses amounting to 10,974 gross tons. Two vessels totalling 8,564 gross tons were British.

May 1944 showed total losses of five vessels amounting to 19,499 gross tons, one being British of 5,105 gross tons.

In May 1943 there were eight total losses.

Questions Asked and Answered in Parliament

Below is a selection of questions of interest to trade and industry answered in the House of Commons

WEDNESDAY JUNE 19

Government Surplus Watches

The Minister of Supply was asked whether his attention had been called to the wide gap between the prices paid to the Government for surplus watches as compared with the maximum retail price of £8 10s.; and if he would arrange for an amendment in S.R. & O. No. 341, to reduce these excessive margins.

The Parliamentary Secretary to the Ministry of Supply, Mr. Arthur Woodburn, replied that Government surplus pocket watches were being widely retailed at prices well below the controlled maximum price and it was not considered necessary to amend the Price Control Order.

THURSDAY JUNE 20

Penknife Prices

The Parliamentary Secretary to the Board of Trade Mr. J. W. Belcher, stated that the maximum prices for sales by manufacturers of penknives were at present fixed at 7½ per cent. above the prices which were being charged in August 1943. Manufacturers' costs had recently been investigated by the Central Price Regulation Committee and following this investigation an amending Order increasing the permitted price to 15 per cent. above 1943 would be made very shortly.

FRIDAY JUNE 21

Animal Feeding Stuffs

The Secretary for Overseas Trade, Mr. H. A. Marquand, said that 6,500 tons of animal feeding stuffs, other than grain, were exported in the four months ended April 1946. Of this total, 2,800 tons went to the Channel Islands, 100 tons to other British countries, 2,700 tons to France, 500 tons to Germany, 200 tons to the Faroe Islands and 200 tons to other foreign countries.

MONDAY JUNE 24

Export of Tractors

Mr. Marquand stated that during the six months ended April 1946, the number of agricultural tractors exported was 3,863.

Whisky Exports

The quantity of whisky exported to the United States in April 1945 and 1946, it was stated, amounted to 157 and 143 thousand proof gallons respectively, the f.o.b. values being £286,000 and £267,000. The dollar returns would be increased in so far as these exports were carried in British ships.

Investigation and Inspection Services

Asked what was the difference between the investigation service and the inspection service of his department, Mr. Belcher replied that the main duties of the inspectors were to assist traders and the public to understand the requirements of the Board of Trade, and to give advice to Headquarters on applications for licences and other facilities after examination on the spot.

The officers of the investigation service visited retailers and others to enforce Board of Trade Orders, such as Price Control and Rationing, and they co-operated with the Police in cases involving offences under the Orders.

Some officers, including inspectors of the Local Price Regulation Committees and Accountants, performed functions of both kinds.

Black-list of Swiss Firms

Mr. Marquand said that His Majesty's Government, in concert with the U.S. and French Governments, considered that the substantial advantages accruing from the Agreement with the Swiss Government warranted the suppression of the Allied Black Lists in the case of Switzerland.

Paper for Industrial Publications

The President was asked how many tons of paper or wood pulp were allocated for use of industrial papers, commercial catalogues, etc., with the object of developing our export trade, in any recent month for which he had statistics. Mr. Belcher replied that many industrial publications, commercial catalogues, etc., were distributed with the direct or indirect object of developing our export trade. Supplementary allocations of paper for such publications for direct export were however made, the current average monthly quantity being nearly 420 tons.

Supply of Molasses

Mr. Belcher stated that a farmer might obtain 10 cwts. of molasses in a season by giving a formal undertaking to his supplier that the molasses was to be used for silage.

For larger quantities a permit must be obtained from the County Agricultural Executive Committee.

This requirement was necessary in view of the world shortage of molasses, and of the fact that molasses supplied for silage was in addition to the farmer's feed ration.

Sale of Cotton Concerns

A questioner asked if the President was prepared to hold an investigation into the buying and selling of cotton concerns in Lancashire and the evil consequences arising from such transactions. Mr. Belcher replied that the position was being carefully and continuously watched, and that we need not expect a repetition of the abuses which occurred after the 1914-1918 war.

Cardboard Exports

The total exports to the Netherlands of uncoated cardboard amounted to 1,200 cwts., valued at £5,000, in the first five months of this year, it was stated. No exports of sawn soft wood or of kraft paper to the Netherlands were recorded during this period.

Export of Utility Garments

Mr. Marquand said that he was considering whether arrangements could be made to permit the export of certain types of utility garments in cases where it could be shown that they were unsaleable in the home market.

Evasion of Maximum Price Order

The President was asked whether he was aware that certain firms normally retailing women's ready-to-wear outer clothing were now selling coats and blouses, ostensibly made to measure, at £40 and £15, respectively, which prices were double and treble the permitted maximum prices for ready-mades; and whether he would cause enquiries to be made into the prices of made-to-measure non-utility clothes with a view to maximum prices being fixed. Mr. Belcher replied that he was aware that attempts at evasion of the Maximum Price Order controlling women's ready-made outerwear were being made, and investigations had already been undertaken by the local Price Regulation Committees, with a view to proceedings being instituted in appropriate cases. The fixing of ceiling prices for all made-to-measure clothes raises wider issues, both of policy and administration. These questions had been carefully examined on a number of occasions, but it had not yet been found possible to devise a scheme which would achieve the results desired without at the same time causing inequity to many reputable firms. He had, however, asked the Central Price Regulation Committee to give further consideration to the question.

Car Exports to India

In the year ended May 1946, 1,305 motor cars, including 10 used cars, were exported to India, it was stated.

Complaints from Buyers of Exports

Asked how many complaints had been received from buyers of our exports that these were not up to pre-war standards of quality, Mr. Marquand replied that he was unable to give the exact number but they had not been numerous. The complaint in each case had been taken up with the supplier with a view to removing the grievance.

Perambulator Shortage

Mr. Belcher stated that he was gravely concerned by the shortage of perambulators, but retailers should already be

getting larger supplies, for the rate of production now was considerably higher than a year ago and had been rising steadily.

Timber Control Officers

Mr. Belcher said that 28 Officers of the Timber Control had been authorised to issue licences to fell timber. Their grades were as follows:—1 Controller, 1 Assistant Controller, 1 Deputy Assistant Controller, 1 Chief Assistant, 14 Area Officers, 10 Assistant Area Officers. None was a permanent Civil Servant. All were connected with the timber trade previously to their present employment.

Porcelain Swing Stoppers

A questioner asked what steps were being taken to increase the home manufacture of porcelain swing stoppers for bottles with a view to remedying their critical shortage in the milk distribution trade and the present necessity of purchasing them abroad. Mr. Belcher replied that one pottery manufacturer took up production of these stoppers during the war and another had recently undertaken to make them, but there was a serious shortage of domestic pottery and of electrical porcelain and it had therefore not yet been possible to increase production of these stoppers sufficiently. Meanwhile, imports were being permitted to meet the needs of users.

Refrigerator Export

The President was asked whether, in view of the need for food economy and the waste of food that took place each year in July and August throughout the country due to refrigerators being unavailable, he would consider curtailing the export of refrigerators during the next three months. Mr. Belcher replied that he did not think he would be justified in hampering the efforts which were being made to build up a valuable export trade in refrigerators from the present modest and controlled level, but all practicable steps were being taken to increase the total supply of refrigerators, the bulk of which was directed on to the home market.

Report on Radio Valve Industry

Asked whether he would consider publishing, and making available to Members, the report of the Central Price Regulation Committee on the radio valve industry, Mr. Belcher said that he had received the report and was considering it in consultation with the Minister of Supply. He was not yet in a position to make a statement.

Softwood Prices

Mr. Belcher said that the maximum prices payable for standing softwood trees varied between 7d. and 1s. 6d. per cu. ft., according to size and species, with an additional 2d. per cu. ft. allowed for felling, lower prices being subject to negotiation. The lowest maximum prices payable for homegrown sawn softwood varied from 3s. to 4s. 9d. per cu. ft. according to size.

Aluminium Houses

The Minister of Supply, Mr. John Wilmot, said that 1,902 aluminium houses were produced during the first five months of this year against a total target figure of 1,725. He expected to reach maximum output in February of next year.

Refrigerator Parts

Mr. Wilmot said that he was doing his best to help firms engaged in the repair of refrigerators consistent with the demands of other important industries which draw on the same resources. There was difficulty, however, in getting an adequate supply of spares for refrigerators of foreign manufacture of which a large number were installed.

New Motor-Cars

Asked what percentage of new motor-cars allocated to the home market in May last were available for purchase by the general public; and what percentage went to Government departments, Mr. Wilmot said that ninety-seven per cent. and three per cent., respectively, were available.

Pocket Watches

Mr. Wilmot stated that government surplus pocket watches were sold by competitive tender. The prices paid to the Government and the prices charged to the public on the retail sale of the watches were, therefore, determined by competition and there was no question of any fixed price. A controlled maximum retail price was imposed by Order and the watches were being widely retailed at prices well below that maximum.

Building in South Wales

Mr. Belcher stated that since his reply on May 1 on Board of Trade sponsored factory buildings in South Wales, building work had started on further factories, five at Treforest, and one at Newport. He was circulating in the Official Report a list of places in the South Wales Development Area in which factory building was programmed to start in July, in August and in September. Under present circumstances, it was difficult to determine the completion dates, but the average time taken was likely to be about six months, varying with the size of the factory and the type of construction.

The following is the list of places in which building work is programmed to start on new factory buildings or extension of over 5,000 square feet during July, August and September 1946:—

Location	July	August	September
Abercarn	—	1	1
Ammanford ...	2	—	—
Bargoed	—	1	—
Barry	2	—	—
Caerphilly	1	—	—
Cardiff	3	2	2
Cwmavon	—	1	—
Cwmbran	1	—	—
Cyfarthfa	1	—	—
Ferndale	3	—	—
Garnant	1	—	—
Gorseinon	1	1	—
Hengoed	1	—	—
Llwynypia	—	—	2
Mountain Ash ...	—	—	1
Neath	—	1	1
Newport	2	1	—
Pembroke	—	—	2
Pengam	1	—	—
Pentreback	—	1	—
Ponterdawe ...	—	—	1
Ponthenry	1	—	—
Porth	1	—	—
Pontypool	—	—	1
Rhydfelin	—	1	—
Risca	—	—	3
Rogerstone	2	1	—
Swansea	2	1	—
Tredegar	2	1	—
Treforest	1	2	1
Tumble	1	—	—
Ynyshir	—	1	—
Ystradgynlais ...	1	—	—
	30	16	15

Liverpool Cotton Exchange Employees

A questioner asked how many employees previously employed by the Liverpool Cotton Exchange would not be taken over by the Government Cotton Control Organization. Mr. Belcher replied that the total staff required, which would be largely recruited from Liverpool cotton firms, would, it was estimated, be about 200, including the Cotton Control's present staff. He was informed that the number of salesmen classers and clerical workers previously employed was about 2,500. A considerable number would no doubt continue to be employed by Liverpool cotton firms, and a further considerable number had either retired or entered alternative employment and did not seek to return to cotton.

Timber from Austria

It was stated that some timber was available for shipment from Austria and that negotiations for a contract for its purchase would shortly be concluded.

Hand Tools

Mr. John Wilmot stated that the hand tool industry was giving priority to the needs of building trade workers, including carpenters and trainees; a programme of imports of the most urgently needed tools had been arranged; and the return of labour to the industry was improving output.

TUESDAY JUNE 25

Exports of Tinplate

Mr. Marquand stated that exports of tinplate last year amounted to 27,169 tons, as compared with 319,308 tons in 1938. All the tinplate being exported to-day was for food packing requirements related to our food import programme, except for small quantities essential for the distribution o oil.

(Continued on next page)

Coal for Export.

The Minister of Fuel and Power, Mr. Emanuel Shinwell, said that in accordance with his instructions the coal now exported from this country, with the exception of shipments to depots abroad for use as ships' bunkers, consisted almost entirely of such very low qualities as dross, gum, duff, inferior unscreened and slacks.

WEDNESDAY JUNE 26

Rubber Handle Grips

Mr. Marquand stated that he was arranging for a considerable proportion of the future production of rubber handle grips for cricket bats to be available for sale in this country.

Overseas Information Division

Asked if he would publish a White Paper, stating the purpose, policy and functions of the Central Publicity Committee of his department, Mr. Marquand replied that there was no Central Publicity Committee for the Board of Trade. Perhaps the questioner had in mind the recently formed Overseas Information Division, the purposes of which, briefly stated, were to disseminate overseas information upon economic, industrial, and trade matters, with particular reference to the export trade, which were important to this country, and to observe and report upon published material overseas which had importance in relation to the trade and industry of this country.

Nylon Stockings

Mr. Belcher said that he was informed that the producers of nylon yarn for the stocking industry had experienced more difficulties than they expected when their estimates led him to express the hope that nylon stockings would be available in the early summer. He had taken steps to impress again upon all sections of the industry the importance of getting British nylon stockings on the market at the earliest possible moment.

Synthetic Rubber

Mr. Marquand said that during March and April 1946 11,236 tons of synthetic rubber (G.R.S.) were exported from the U.S.A. to the United Kingdom at a price of 18½ cents per lb. c.i.f. United Kingdom port. No rubber was sold to the U.S.A. from Malaya during those months as the U.S.A. allocation for the first quarter of the year had all been shipped by the end of February.

Esparto Grass

It was estimated that during the current year 125,000 tons of esparto would be imported, part of which would be required for stocking, and that straw consumption might be reduced by 50,000 tons, it was stated.

Reports from Abroad

Asked whether he would revert to the pre-war practice of publishing reports from the Commercial Secretariats of H.M. Diplomatic Missions abroad, Mr. Marquand said that it was intended as soon as practicable to resume the publication of Reports upon economic and commercial conditions in individual countries on something like pre-war lines.

Textile Machinery Industry Committee of Enquiry

It was announced in the House of Commons on June 3, 1946, that the Minister of Supply was to appoint a small Committee under the Chairmanship of Mr. Justice Evershed to investigate on his behalf and report on those matters connected with the manufacture and supply of textile machinery to the cotton industry recommended for immediate investigation in the Report of the Cotton Industry Working Party.

The Minister of Supply has now announced that the following persons will constitute this Committee :—

Mr. Justice Evershed, Chairman.

Mr. F. E. Board, F.C.A., a member of the firm of Cobden Board & Company, Chartered Accountants, of Sheffield.

Mr. W. D'Arcy Madden, M.I.E.E., M.I.Mech.E., Chairman and Managing Director of Hick, Hargreaves & Co., Ltd., engineers, of Bolton.

Mr. W. H. Green, J.P., a member of the London County Council.

A representative of the Ministry of Supply.

Anyone desiring to communicate with the Committee should write to the Secretary of the Committee, Room S.96, Ministry of Supply, Shell-Mex House, Strand, W.C.2.

COMPANY MEETING

MILNERS SAFE COMPANY LIMITED

STRONG DEMAND FOR PRODUCTS

Sir JAMES E. T. RITCHIE, Bt., the Chairman, presided at the ANNUAL GENERAL MEETING of Milner's Safe Company Limited, held at the registered offices 58 Holborn Viaduct, London, E.C.1 on June 27.

The following is his statement circulated with the report and accounts :—

The year under review has not seen your Company back to normal production, although during the past few months efforts have been made to make some contribution towards supplying that large demand which inevitably follows a period such as that from which we have recently emerged.

When the accounts were last presented, the War against Japan was still being waged and our resources were being utilized for Government contracts of varying types. We were mainly engaged on producing "Neptune" amphibious freight carrying vehicles, and production on these continued almost to the end of our financial year. I am pleased to say that we have now shaken off the manufacture of warlike appliances, but nearly seven years of concentration on this type of work leaves many most troublesome legacies behind.

Considerable quantities of redundant material have accumulated and await disposal; labour rehabilitation for peace time activities requires most careful management; many shops in the Works have to be re-planned and machinery re-installed; designs of future product lines call for heavy work in the drawing office with subsequent accumulation of demands on the tool-room. Along with these problems, considerable difficulty continues in obtaining essential supplies and materials, and controls, many of which may still be necessary, prevent that freedom of action for which we all crave. On the other hand, we have the huge demand which has accumulated during the War years urging us to deliver the goods.

Such complexities are not, of course, peculiar to our own Company, but owing to our complete switch-over during the War to work of an entirely different nature from that which has been our custom, we have acute problems facing us. Nevertheless, I can assure you that these are being handled carefully and expeditiously and although the present year will certainly bristle with difficulties, I feel that Milners will emerge from this testing time with enhanced production facilities and selling vigour.

I have already indicated that the demand for our production is on a large scale and exhaustive sales researches have been conducted to ensure that we can maintain a steady market for our goods on a long-term basis. There should be no great difficulty in filling order books for the next few years, but nowadays industry in general must plan with far-sightedness and vision.

We are spending no inconsiderable thought and activity in probing export possibilities and at the moment our export orders are far in excess of pre-war figures. In this connection, I have recently been privileged, on behalf of the Company, to visit Middle-East Countries where demands for up-to-date security installations and steel office equipment—which we plan to produce on a large scale—are increasing. This visit has enabled the Company to make many useful, and, I hope lasting contacts, and the necessity and wisdom of this personal association with our overseas friends will be constantly reviewed by your Board.

I should like to place on record here the valuable assistance I received from our Government and Embassy Officials, and also our Banking friends during my travels in the Middle East; this contributed greatly to the usefulness of the tour.

The modernization of the Birmingham factory of Whitfields Safe & Door Co., Ltd. (which we acquired in 1944) is now being proceeded with and before long it will be in full production of a new range of Safes and Strong Room Doors.

Your Board has thought it prudent to present the Accounts this year in a new form, consistent with the suggestions made in the Cohen report. Comparisons with previous years are not therefore quite so obvious, but shareholders will no doubt note that our net profit, after providing for taxation liabilities on figures up to date, is slightly in excess of last year. After maintaining the proposed dividend and bonus of last year, the carry-forward on the Parent Company's accounts is increased from £9,261 to £12,761. A further extension is being made to our Works buildings, part of the cost of which is included in the current Balance Sheet. Substantial improvements have been made to our Plant and Machinery which now stand at a high efficiency level. Our total assets of over £441,000 are conservatively valued and shareholders will doubtless appreciate the very sound position of the Company's financial affairs. And so, in spite of the immediate difficulties which I have mentioned, I think we are justified in facing the future with confidence.

Notice has been given of an Extraordinary Meeting to give effect to the conversion of the Company's Share Capital into stock of five-shilling units. This will not only relieve our secretarial department of unnecessary work involved in numbering of shares, but will also assist the small investor to obtain an interest in our undertaking.

During the year, many of our employees have returned from the Services and we extend them a warm welcome and our best wishes. They come back to rejoin a staff which has given splendid service during the past years, and we know that together they will continue to serve the Company with their characteristic loyalty.

I should like to pay tribute here also to our Joint Managing Directors whose efforts during the War years I have referred to on previous occasions. They are now faced with the many problems indicated above, and our thanks are due to them for their unsparing efforts during the past year.

The Report was adopted.

This report is published as an advertisement.

Industrial Teams' Reports on Germany

FURTHER Reports submitted by teams of industrial experts, who have visited Germany under the auspices of the Combined Intelligence Objectives Sub-Committee, the British Intelligence Objectives Sub-Committee and the Field Information Agency, Technical for the collection of scientific and technical intelligence from German industry, are now available for publication.

Reports, as they are published, will be distributed to the chief Public Libraries, to Universities and to Professional and Scientific Institutions and to the Trade Associations concerned. A limited number of copies will also be on public sale and may be ordered from the Sales Offices of, H.M. Stationery Office at:—York House, Kingsway London, W.C.2; 13a Castle Street, Edinburgh, 2; 39-41 King Street, Manchester, 2; 1 St. Andrews Crescent, Cardiff; and 80 Chichester Street, Belfast, at the prices indicated against each Report in the list given below.

The following additional Reports are now available for distribution as described and for purchase at H.M. Stationery Office:—

No. of Report	Title	Price
CIOS XXV—12 ...	*C. Lorenz A.G.*: Radar and Radio equipment. Details of organization	1s. 6d. (post free 1s. 7d.)
CIOS XXXII—88 ...	*Stassfurter Rundfunk, Stassfurt.* Guided missiles	1s. 0d. (,, ,, 1s. 1d.)
BIOS 258	*Carbon Electrodes, I.G. Farben, Griesheim*	1s. 0d. (,, ,, 1s. 1d.)
BIOS 353	*Preparation of 5—Diethylaminopentanol—2 by the Reppe process* ...	0s. 6d. (,, ,, 0s. 7d.)
BIOS 356	*Characterization of Butadiene Catalysts by X-ray and Chemical Analysis*	1s. 0d. (,, ,, 1s. 1d.)
BIOS 458	*The Ceramic Industry of Germany*	4s. 6d. (,, ,, 4s. 8d.)
BIOS 480	*German Spectacle Frame Industry*	2s. 0d. (,, ,, 2s. 1d.)
BIOS 497	*Aircraft Tyre Design and Development in Germany*	6s. 0d. (,, ,, 6s. 2d.)
BIOS 501	*Rugged Valves and Mechanical Tests for Valves and Components* ...	3s. 0d. (,, ,, 3s. 2d.)
BIOS 504	*Visit to Metallgesellschaft A.G. Frankfurt a/M.* Metallurgy. Notes on some subjects of research and laboratory activities	1s. 6d. (,, ,, 1s. 7d.)
BIOS 505	*Light Alloy manufacture at Aluminiumwerke Gottingen G.m.b.H., Gottingen.*	1s. 0d. (,, ,, 1s. 1d.)
BIOS 507	*Dr. F. Raschig, G.m.b.H., Chemische Fabrik, Ludwigshafen. Coal Tar Distillation. Chlorinated Phenols. Phenol-Formaldehyde Resins. Synthetic Phenols.*	3s. 0d. (,, ,, 3s. 2d.)
BIOS 508	*Fried. Krupp, Germaniawerft, Kiel. Water Brake Dynamometers...*	2s. 0d. (,, ,, 2s. 1d.)
BIOS 509	*Voith-Schneider Propeller*	1s. 0d. (,, ,, 1s. 1d.)
BIOS 510	*Samples of Petroleum Products collected from the Hamburg, Hannover, Bremen and Kiel area.*	3s. 6d. (,, ,, 3s. 8d.)
BIOS 511	*Ruhr-Chemie A.G. Sterkrade Holten. Interrogation of Dr. O. Roelen.* The Fischer-Tropsch Synthesis and its products. Synthetic Lubricants. Town Gas and Methanised Gas for Automotive Propulsion.	2s. 6d. (,, ,, 2s. 8d.)
BIOS 512	*Schlafhorst Chemische Werke G.m.b.H. Hamburg, Germany. Lubricants.*	1s. 6d. (,, ,, 1s. 7d.)
BIOS 536	*Tallol: Its processing and utilization in Germany*	1s. 0d. (,, ,, 1s. 1d.)
FIAT 450	*Wood and Cellulose research in Germany*	4s. 6d. (,, ,, 4s. 8d.)
FIAT 486	*Cellulose Ethers, Esters and mixed Esters at Biebrich (Wiesbaden). Elberfeld and Dormagen.*	2s. 0d. (,, ,, 2s. 1d.)
FIAT 547	*The Italian Hemp Industry*	1s. 6d. (,, ,, 1s. 7d.)
FIAT 560	*New Vacuum Tube Techniques for the Telefunken Rohrenwerke, Berlin.*	2s. 0d. (,, ,, 2s. 1d.)
JIOA 9	*German Vacuum Evaporation methods of producing First-Surface Mirrors, Semi-Transparent Mirrors and Non-Reflecting Films.*	4s. 0d. (,, ,, 4s. 2d.)

Further reports, as they become available for publication, will be notified from time to time in the *Board of Trade Journal* and will also then be available for reference at the principal public libraries.

FIAT 550. A German Finish for Spun Rayon Fabrics combining Water—Repellancy, *Crease*-Resistance and Low Residual Shrinkage. Price 6d., post free 7d. Published June 15, the word *Crease* incorrectly appearing as *Grease*.

Building Materials Distribution Enquiry

The Minister of Works on Monday made the following announcement in the House of Commons:—

"I have appointed an independent Committee, with the following terms of reference: To examine the organization and methods of distribution of building materials and components with particular reference to cost and efficiency, and to make recommendations. I am glad to announce that Sir Ernest Simon has consented to act as chairman, and the other members will be Sir Sam Brown, solicitor, Professor Arnold Plant, economist, and Mr. R. E. Yeabsley, accountant."

The Committee are proposing to invite representative bodies of builders' merchants, manufacturers and purchasers of building materials to submit evidence to the Committee. Any communications concerning the work of the Committee should be addressed to the Secretary at the Ministry of Works, Lambeth Bridge House, S.E.1.

Alternative Industries for Rochester

Following the announcement of the decision to transfer the production of Short Bros. from Rochester to Belfast, the Board of Trade have in hand the task of introducing alternative industry. A special meeting of the London and South Eastern Regional Board for Industry held to consider the matter was informed that discussions have already begun with several good firms who have expressed keen interest in the area.

The shortage of good factory space generally is so acute that competition from suitable firms is likely to be extremely keen, and the Distribution of Industry and Regional Division, Board of Trade, Millbank, S.W.1, will welcome enquiries from any firm requiring premises and labour in that area.

Official Announcements

Men's and Boys' Underwear : The Board of Trade have issued the Utility Apparel (Men's and Boys' Shirts, Underwear and Nightwear (Consolidation) Directions, 1946), which consolidate and replace the Utility Apparel (Men's and Boys' Shirts, Underwear and Nightwear) (No. 6) and (No. 7) Directions, 1945, S.R. & O. 1945 Nos. 285 and 1519.

The maximum prices for all garments have been increased to permit the manufacture of non-austerity styles, e.g. double cuffs on shirts, and to assist manufacturers in meeting higher wage and other costs.

Maximum prices are also fixed for garments made in a number of new cloths and the use of certain existing cloths has been extended.

Men's short sleeved cotton shirts with collar attached may now be made in any size and of any length, and certain intermediate sizes are now scheduled for trunks and vests.

Copies of the new Directions, which came into operation on June 28, 1946, can be obtained through any bookseller or newsagent or direct from H.M. Stationery Office, Kingsway, W.C.2.

★

Timber Control Department : The Timber Control Department of the Board of Trade announces the following staff changes with effect from July 1, 1946 :—

Mr. Stanley Hine and Mr. R. P. C. Gotto have relinquished their posts as Area Officers at Area 5, London, and Area 11, Belfast, respectively, which they have occupied since the inception of the Timber Control.

Mr. G. F. W. Edwards has been appointed Area Officer of Area 5, London, in place of Mr. Hine, and will be succeeded as Area Officer at Area 8, Bristol, by Mr. F. W. James.

Mr. C. R. A. Potter, who has hitherto been Joint Area Officer with Mr. Gotto, will now occupy the post of Area Officer at Area 11, Belfast.

★

Acetate Prices Increase : Increases in the maximum prices for Acetates which have been in force since January 1941 are made by a new Board of Trade Order (The Control of Molasses and Industrial Alcohol (No. 20) Order, 1946).

The Order, which comes into force on July 1, 1946, amends The Control of Molasses and Industrial Alcohol (No. 19) Order, 1945.

★

Visas for Holland : Hitherto applications for visas for business journeys to Holland had to be addressed to the Royal Netherlands Embassy, Economic Department, at 14 Hay Hill, W.1. As from June 18 this task has been taken over by the Consulate General for the Netherlands, 33 Weymouth Street, London, W.1. Applicants have to send in a letter from their firm stating the purpose of their journey. Furthermore they have to fill in two forms and hand those over together with a passport and two passport photos.

The offices of the Economic Information Service for the Netherlands, Economic Department, Royal Netherlands Embassy, have moved from 14 Hay Hill, W.1, to Hereford House, 117b Park Street, W.1 (3rd floor, flat 4) ; telephone Mayfair 8511, ext. 23.

★

More Coupons for Expectant Mothers : As announced in Parliament on Wednesday, expectant mothers are to be given 70 coupons instead of 60 on and after July 1.

Where the child is born on or after July 1, and the mother has already received her 60 coupons, she will be given an extra 10 coupons at the Food Office after the birth of her child. It is not possible for the Food Office to issue this extra 10 before the birth where the mother has already received her 60 coupons.

No issue can be made in respect of children born before July 1.

The additional 60 coupons hitherto allowed for twins will similarly be increased to 70, with a further 70 in the event of triplets.

No distribution of the extra 10 will be made before July 1.

★

Transmission of Catalogues for Rome : United Kingdom manufacturers and exporters are reminded that catalogues and other matter intended for the Commercial Counsellor should be addressed to the Counsellor (Commercial), British Embassy, Rome.

" A New Industry in Scotland " : It is expected that initial employment will be provided for 900 people in spinning and weaving at the factory being built at Uddington by the Scottish Industrial Estates, Limited, for Salts (Saltaire) Ltd., and not 9,000 as stated previously.

★

Trade Commissioner Calcutta : The Board of Trade announces that Mr. J. H. O'Hagan, formerly Assistant to H.M. Trade Commissioner at Calcutta, has been promoted to be one of His Majesty's Trade Commissioners, Grade II, in India and has taken up duty at Calcutta.

MINISTRY OF SUPPLY

Cadmium Decontrolled : The Ministry of Supply announces that the Control of Non-Ferrous Metals (Nos. 6 and 18) (Cadmium) Orders 1941-45 have been revoked by the Control of Non-Ferrous Metals (No. 23) (Cadmium) (Revocation) Order 1946, dated June 17, 1946, which came into force on June 24, 1946.

The 1946 Order revokes the only Orders made by the Ministry of Supply under the title " Control of Non-Ferrous Metals (Cadmium) " which regulated the acquisition, disposal and price of Cadmium.

★

Council of Industrial Design : The Council of Industrial Design has appointed Mr. N. E. Kearley, A.M.I.E.E., as Deputy Director.

Mr. Kearley has had a wide practical experience of the engineering industry in various technical capacities before becoming Civilian Technical Officer at the Royal Aircraft Establishment, Farnborough. In 1929 he joined the Examining staff of the Patent Office and later served for several years in the Industries' and Manufacturers' Branch of the Board of Trade.

He joined the staff of the Ministry of Supply in 1939, but in 1940 he was given leave of absence to join the Indian Army Ordnance Corps. He served successively as Deputy Assistant Director of Mechanisation, as officer commanding the Mechanization Design Establishment and as Chairman of the Tank Development Board, Calcutta. He held the rank of Lieut.-Colonel in the Indian Electrical and Mechanical Engineers.

He returned to the Ministry of Supply in October 1945 and has recently rejoined the staff of the Board of Trade as Liaison Officer in Germany.

BRITISH STANDARDS

The British Standards Institution have just issued Supplement 3 to B.S.1133, *Packaging Code*. This supplement describes metal lined and metal sheathed cases and gives general specifications for them. The section deals only with internal cases intended to be "float packed" for stores such as optical instruments and electrical equipment requiring Method II packs as described in Section 3 of the Packaging Code.

The supplement also describes various types of case closures for use on wooden and plywood cases which are required for several journeys.

Copies of the supplement are obtainable from British Standards Institution, 28 Victoria Street, London, S.W.1, price 2s., post free.

MISCELLANEOUS

Key Industry Duty Exemptions : The Treasury have made an Order under Section 10(5) of the Finance Act, 1926, as amended by subsequent enactments and coming into force on June 29, 1946, exempting from Key Industry Duty until August 19, 1946, the following :—

Guanidin carbonate.
Guanidin nitrate.
Guanidin sulphate.
Guanidin sulphocyanide.

Copies of the Treasury Order, which is entitled " The

Safeguarding of Industries (Exemption) (No. 3) Order, 1946" may be obtained from His Majesty's Stationery Office, York House, Kingsway, London, W.C.2, or through any bookseller, price one penny (S.R. & O. No. 884, 1546).

★

Purchase Tax on Furniture : The Treasury announce that they have made an Order under Section 20 of the Finance (No. 2) Act, 1940, providing that as from July 8, 1946, the present exemption from Purchase Tax for domestic utility furniture made of wood shall be extended to cover other types of furniture, including metal furniture, to which the Utility Mark CC41 has been applied.

★

Corn Prices in England and Wales : The Ministry of Agriculture and Fisheries state that the average prices of British corn per cwt. in the week ended June 15 were : wheat, 15s. 5d., barley, 24s. 3d. and oats, 16s. 4d. and for the week ended June 22 the figures were wheat, 15s. 5d., barley 23s. 8d. and oats 16s. 3d.

Sale of Surplus Machine Tools

The Ministry of Supply announce that three new permanent selling centres for surplus machine tools will be opened on Tuesday July 9, 1946, at Church Road, Erith, Summerfield near Kidderminster and Willowtree Lane, Yeading. These are in addition to the two selling centres already functioning at Burghfield near Reading, and Thorp Arch near Leeds. It is proposed to open more of these centres throughout the country in the near future.

Machine tools will be on view at these depots between 10 a.m. and 4 p.m. Mondays to Fridays, when prospective buyers can inspect them. On-the-spot sales can be completed.

Each of these depots has a storage capacity of over 2,000 machines, and a very large selection of good quality general purpose machine tools will be available. Prices range from £10 for a small drill to £2,000 for a large press, and are based on a formula laid down by the Ministry which ensures a fair price for all concerned. Purchasers are required to declare that any tools bought are required for their own production or for export.

A further "on-site" sale of surplus machine tools will be held by the Ministry of Supply at Messrs. Vickers Armstrong Ltd. Castle Bromwich Works near Birmingham, on Wednesday, July 17, at 10 a.m. until Tuesday, July 23. There will be 600 machine tools available including riveters, capstan lathes, millers, grinders, drillers, and miscellaneous types.

Unsold machines will be on view daily from 10 a.m. to 4 p.m. (except Saturdays and Sundays) from July 24 until July 30, for the purpose of competitive tendering. Prospective purchasers should visit the site between these dates to view the residual machines and obtain tender forms and guidance regarding procedure.

Cost-of-Living Figures

At June 1 the official cost-of-living index figure was 103 points above the level of July 1914, as compared with 104 points a month earlier. The fall in the figure was due to reductions in the prices of various articles of domestic ironmongery and pottery following the recent remission of purchase tax on such goods.

For food alone the index figure remained unchanged at 69 points above the level of July 1914. At June 1 the average price of bread was relatively higher than a month earlier in consequence of the reduction in the size of the loaf. This increase, however, was offset by general reductions of 2d. per lb. in the price of butter and nearly 1½d. per 7 lb. in the price of potatoes.

COMPANY MEETING

ROYAL SOVEREIGN PENCIL

SERIOUS SHORTAGE OF LABOUR

The Twenty-sixth Ordinary General Meeting of the Royal Sovereign Pencil Company, Ltd., was held on June 21 in London.

Mr. Percy Charnaud (Chairman and Managing Director), after referring to the loss they had sustained by the death of the late chairman, Mr. Walter Henderson-Cleland, said :—

The profit and loss account shows a small improvement in the trading profit which is offset by an increase in the taxation charge leaving the net profit at approximately the same figure as last year.

While the future prospects of the company are good, the outlook for this year is somewhat overcast, due to the very serious shortage of labour. More than twelve months have elapsed since the cessation of hostilities in Europe, and yet in spite of the return of employees from the Services, our present productive labour force is less than it was in 1943 and is only one-third of our pre-war figure.

Consequently instead of production being stepped up as planned, there actually has been a drop in output with the result that the company is far from able to meet the many demands made upon it, and is compelled to refuse most of the large orders received almost daily from overseas markets which are clamouring for its products. This reduction of output also has the serious effect of preventing the economic employment of reinstated ex-Servicemen of the unproductive categories, such as administrative men, salesmen, etc. thus overloading overheads, and causing a sense of frustration and disappointment to these men who are so eager to get back to the pre-war activities in which they specialized.

Government Control Continues

The pencil industry is still under Government control, which limits production to utility lines, but even if these restrictions were lifted, it would not be possible to revert to its well-known quality brands until there was some marked improvement in the labour situation. Until this improves, therefore, we must continue to produce utility lines at controlled selling prices, which have been rendered uneconomical by the shrinkage of output and the increase of costs.

Your directors have long foreseen that shortage of labour in the London area was a limiting factor to expansion, and have had plans under study for the removal of the factories to a more suitable area. Consideration of these plans was interrupted by the outbreak of war, but when last year the Government announced its policy of fostering the development areas, by granting priority licenses for labour and materials for the construction of factories in such areas, we immediately instituted a careful survey of available sites.

This eventually resulted in your company purchasing some 16 acres of land at Llantrisant, about 10 miles from Cardiff, on which to erect two factories to replace those at Neasden.

The first of these two factories is nearing completion and will replace the woodworking one at Neasden, which has been under requisition by the Admiralty since 1942, and the sale of which has just been satifactorily completed. Building operations will shortly be commenced on the second factory, which will replace the works in which black and coloured leads are now being produced, and it is hoped that by the end of 1947 the entire production will have been transferred to South Wales. It is anticipated that the company will be able to meet the total cost of this project out of its own resources and without having to seek accommodation from its bankers.

I cannot leave this subject without referring to the courtesy and assistance we have received from the officials of the Board of Trade, both in London and in the Regional Office at Cardiff. They have allowed nothing to stand in the way of our progress, and thanks to their ready assistance and co-operation, the many difficulties that were bound to be encountered on such an undertaking, particularly in these times, were quickly removed.

The Report and Accounts were unanimously adopted.

This report is published as an advertisement.

OVERSEAS TRADE SECTION

Possible Development of Trade between Egypt and Great Britain

The following article was written for the Board of Trade Journal *by the First Secretary (Commercial), Cairo. The Export Promotion Department, 35 Old Queen Street, London, S.W.1, will be pleased to answer any questions arising out of this article.*

AT the outbreak of war in 1939 Egypt was as she always has been, and as indeed she still is, overwhelmingly an agricultural country. Her agricultural production was dependent upon irrigation from the waters of the Nile, the country being virtually rainless except for a small rainfall in the north of the Delta, and, to some degree, upon the import of artificial fertilizer. Egyptian economy was dominated, as it still is dominated, by the production and export of cotton. These exports constituted, as again they still do, the bulk of total exports. The great majority of the total population of Egypt, at that time between 16 and 17 millions, were then as now peasants living in small towns and villages in the Delta, and along a narrow strip on the banks of the Nile south of the borders of the Sudan. Although there was a small wealthy class consisting of landowners and of a very few business men, and although there was a small professional and middle class, the bulk of the population lived at a low standard.

The years immediately preceding the war were of some difficulty for Egypt since although in 1937-38 there had been a record crop of cotton, prices of cotton began to fall thereafter and by the spring of 1939 had dropped by about 25 per cent. The effect of this had been apparent in the figures of Egyptian total trade. Exports, which had amounted to £E38·7 millions in 1937 (against about £E33 millions in 1936), had fallen by 1938 to only £E28·6 millions. Reduction in exports of cotton accounted for most of the fall between 1937 and 1938, the figures for cotton being respectively £E29 and £E21 millions. This decline in the cotton situation had had its effect upon imports also. Despite the situation then prevailing of re-armament, imports, which had risen from £E31 millions in 1936 to £E38 millions in 1937, fell in 1938 to less than £E37 millions.

Egyptian industry before the outbreak of war was on a very limited scale. The group controlled by the Misr Bank, which operated a considerable cotton spinning and weaving plant at Mehalla el Kubra, had begun arrangements for the manufacture of wool, and the establishment of a factory for fine cotton spinning under the same auspices (but with the participation of United Kingdom interests also) at Kafr el Dawar was under way. There was also a certain output of silk, knitted goods, blankets, rayon weaving and linen. There was a certain production of manufactured foodstuffs, for example starch and cheese, but with the exception of the growing and refining of cane sugar the food industry was on a small scale. There was a limited chemicals and soap production, a fairly substantial oil pressing industry, and a substantial production of cement. There was also a small production of glassware, paper, and a certain amount of manufacture and repairing of light products in iron and steel, e.g., bedsteads. With the exception, however, of cotton spinning and weaving and of sugar, industry was on the small scale and did not play a large part in the economic life of the country. Mining operations consisted principally of:—

(i) the production of oil (about 250,000 tons a year) and refining of oil (capacity about 400,000 tons);
(ii) the mining of phosphate rock (average about 500,000 tons a year);
(iii) manganese ore; and
(iv) a small output of gold.

Foreign Trade

In foreign trade the United Kingdom was the principal supplier to Egypt and the principal purchaser of her goods. Imports from the United Kingdom amounted to over one-fifth of the total, and exports to the United Kingdom, nearly all of cotton but including also a certain amount of cotton seed and rice, amounted to about one-third of Egyptian total exports. The other principal suppliers to Egypt were Germany, Italy, Belgium, France, Japan, the United States and certain Continental countries. Amongst the principal destinations of Egyptian exports in addtion to the United Kingdom, again mostly of cotton, were Germany, France, Italy and other Continental countries.

As stated above, cotton accounted for the vast bulk of Egyptian exports; for instance in 1938, out of exports of approximately £E29 millions, exports of raw cotton amounted to over £E21 millions. Of the balance of exports not far short of £E3 millions was accounted for by cotton seed, cotton seed oil and cotton seed cake, while onions, rice and eggs in that order of importance accounted together for over £E1¾ millions. Exports of phosphate and manganese ores amounted to over £E350,000. The United Kingdom was the principal purchaser of Egyptian cotton.

Egypt's principal imports of which the United Kingdom was the main supplier consisted of textile manufactures; minerals including coal and petroleum; manufactures of metal; machinery and apparatus including electrical apparatus; means of transport; the products of chemical and pharmaceutical industries; and processed foodstuffs and alcoholic beverages. The main imports from the United Kingdom were coal, cotton and other textile manufactures, machinery and parts thereof (including electrical), manufactures of iron and steel, rail and road transport equipment, chemicals and drugs, whisky and processed foods. It is noteworthy that in 1938 coal and textile material manufactures amounted to approximately £E1¾ millions each out of a total of £E8·7 millions imported from the United Kingdom.

The Egyptian visible balance of trade had from 1933 to 1937 inclusive shown a favourable position, but in 1938 due to the fall in the value of cotton the position was reversed and a substantially unfavourable balance emerged for the first time in many years. The budget showed a small deficit with expenditure running at approximately £E40 millions.

In short therefore Egypt prior to the war presented the picture of an overwhelmingly agricultural country, dependent upon the one crop of cotton for nearly all her exports, and importing virtually the whole of her requirements of manufactured goods whether capital or consumer in nature.

Economic Development

During the war Egypt, in common with presumably nearly all other countries in the world, suffered from inability to continue normal economic development and to obtain replacements, for example spare parts, and from a general shortage of goods. There were however two items which affected Egypt specially and with great force. The first of these was the very heavy military expenditure incurred by British and other Allied forces, and the second the necessity for the Allied authorities to economise in the use of shipping to the Middle East for the satisfaction of civilian requirements.

As a result of these factors prices in Egypt rose steeply. The cost of living index now stands at a figure nearly three times that of pre-war, while the index of wholesale prices has risen more than three times. Large balances have been accumulated in London on Egyptian account, and the amount of money available in the country has increased enormously. Both bank deposits and money in circulation have increased several fold.

In view of the need to conserve shipping space for the most essential items, and to reduce the need for import of bulky items such as foodstuffs, the acreage under cotton in Egypt was drastically reduced and fell from 1,757,000

feddans* (average 1936 to 1940), to little over 700,000 feddans in 1942. The acreage under cotton has since, however, increased and in 1945 stood at 984,000 feddans. Against this the areas under wheat, barley, millet, and particularly maize, have been substantially increased in order to meet the food requirements of the country. At the same time imports of nitrogenous fertilizer have had to be very much reduced and the rate of import in the last few years has been little more than half of the pre-war rate. Imported fertilizer is not now allocated to cotton, and this covers a part of the reduction in imports. The reduction in availability of fertilizers and the alteration in crop rotation required by war conditions are however reported to have had a somewhat detrimental effect on the fertility of the soil. Despite all these factors however, there are still very large quantities of cotton in stock in Egypt; the disposal of these stocks and of future crops is a matter which is very much exercising Egyptian opinion. In this connection it is of course relevant that the textile industries of many countries which pre-war purchased Egyptian cotton have either suffered from damage during the war or have not yet been able to resume full scale production due to shortage of labour or other factors. It is also relevant that large stocks of cotton, although of shorter staple, exist in other producing countries.

Essential Requirements

During the war the declared policy of the supply authorities, administered through the Middle East Supply Centre in Cairo and its branches throughout the Middle East, was that although Egypt and other countries in the Middle East were to be adequately provided with their essential requirements, neither shipping nor supply considerations permitted of the import of any appreciable quantity of non-essential goods. The result of this policy became manifest not only in the agricultural development mentioned above, but also in the reduction of imports of many other commodities. Imports of coal, which in 1938 had amounted to well over 1½ million tons, had dropped in 1942 to little over ¼ million tons, and of this reduced quantity the bulk was for the use of the Egyptian State Railways. Even the Railways, however, had converted 70 per cent. of their locomotives to burn fuel oil instead of coal. In a similar way after 1941-42 the import of the majority of consumer goods and of a wide range of capital goods was drastically reduced or even in many cases entirely suspended. As a corollary and in a way as a result of this policy, there was a considerable development in industrial production in Egypt. Striking increases in production occurred in a variety of industries including cotton yarn and cloth, beer, preserved foods and jam, soap, sulphuric acid, super-phosphates, alcohol, glycerine, paints, oil seed pressing, glassware, paper and cardboard, hollow ware and crockery, cement, and pharmaceuticals. A number of new industries also emerged, for example, a jute mill, the manufacture of battery acid, calcium carbide, primus stoves and parts (imported pre-war from Sweden), electric lamp bulbs, cooking and heating stoves, a number of chemicals, dehydration of vegetables, cordage, crown corks, cigarette lighters, matches, dolls and toys, and so on. There has also been progress in maintenance and production of spare parts for the mechanical and electrical side of the engineering industry. During the war Egyptian industry has enjoyed an unsatisfied and insistent demand. With the resumption of imports however it is expected that many industries whose emergence or expansion was entirely due to war time conditions and the quality of whose product was often very poor, will suffer rapid contraction.

Production of petroleum, which has been pressed vigorously for war-time reasons, has increased from ¼ million tons to approximately 1¼ millions. A strike of oil has also recently been made by a British owned company in the Sinai peninsula. Egyptian fuel oil consumption has increased considerably during the war, but Egyptian refining capacity (mainly owned by Anglo-Egyptian Oilfields) is now able to supply a large part of the country's requirements, being more than able to meet requirements of petrol and able to satisfy a large part of other requirements. Aviation spirit, lubricating and gas oils, bunker fuel and the bulk of the kerosene consumed are however still imported.

During the war moreover the British Army established an important base area in Egypt which naturally included large numbers of workshops and other similar establishments. Very large numbers of Egyptians were employed as labour for the Army and it is believed that for a considerable period the total numbers directly or indirectly employed by the British Army at least equalled the total numbers employed in Egyptian industry and commerce prior to the war. Many of these men have acquired a knowledge of industrial operations. Egyptians hope that this experience will make these men a suitable basis for the labour force required for the expansion of Egyptian industry, which is the earnest desire of responsible Egyptian circles and which is further discussed below. The opinion is also frequently expressed that the development of local industry during the war, the employment of many Egyptians by the Army, and the prospects for future industrialization in Egypt, taken together provide the basis for a considerable expansion of the Egyptian middle class. It is obvious that a development of this kind will be of profound significance in the economic and commercial future of the country.

The Egyptian budget shows a surplus, with both expenditure and receipts now running at a level more than twice that of pre-war. The Government has also accumulated a useful reserve fund.

In brief it may be said that during the war Egypt has increased her industrial production substantially and has reached a stage when further increases in industrial production (discussed further below) are to be expected. Some of these industries, e.g., dehydrated vegetables, canned foods, textiles, hope to find export markets. There is, however, no indication that exports of these items, or of any other Egyptian production, will in any way compare in importance with exports of raw cotton. In respect of dependence upon this one crop, Egypt therefore enters the peace in a position not so very different from that in which she entered the war.

Imports and Exports

	£E (millions) 1938	1945
Total Imports	36·8	59·7
Total Exports	28·6	41·6

The increase in values shown above in fact masks a reduction in quantity. Figures of pre-war total volume of trade are not available; but the following items are indicative of a general trend: in 1938, 513,799 tons of fertilizer were valued at £E2,935,000; in 1945, 260,908 tons were valued at £E4,177,000—an increase in unit cost of about threefold. The increase in the unit cost of imported tobacco was about fivefold: of petroleum products about twofold: of jute sacks about threefold: of coal more than fourfold: these five items together amounted by value to about two-fifths of the total imports in 1945, against only just over one-fifth in 1938.

Similarly the increase in the value of Egyptian exports masks a reduction in volume. Exports of cotton in 1938 were 357 thousand tons valued at £E21 millions and in 1945, 185 thousand tons valued at £E32 millions. The balance of the increase in the value of total exports is more than accounted for by the increase (both in volume and unit value) of exports of rice, from 65 thousand tons valued at £E684 thousand in 1938 to 134 thousand tons valued at just over £E4 millions in 1945.

It is clear from the foregoing that the volume of Egyptian foreign trade is still very substantially below the level of pre-war years.

As regards the composition by commodities of Egyptian foreign trade, the preponderance of cotton in exports has not been substantially diminished. As regards imports, it has already been pointed out that there was a striking increase in unit cost of imports. Bearing these qualifications in mind the principal changes by value in imports have been reductions in textiles, coal, timber, common metals and manufactures, machinery and means of transport (all these mask heavy reductions in volume.) There have been increases by value in fertilizers, petroleum products and tobacco, in the last two cases with increases in volume also.

As regards change of source of imports and destination of exports, changes have been very great indeed.

In 1938 47 per cent. of Egypt's imports came from countries (mainly in Europe) which later were either enemies or occupied by the enemy, and a further 23 per cent. from the United Kingdom; while in the case of exports the proportions were respectively 48 per cent. and 33 per cent. Egypt's foreign trade was thus seriously disrupted during the war.

* 1 acre=(·9633 of a feddan.)

Import licences were introduced in November, 1941, with the object of restricting imports of unessential goods. In the same year His Majesty's Government set up the Middle East Supply Centre in Cairo to ensure supplies of essential goods to the Middle East, as far as this was possible in view of shipping and supply shortages, and to ensure also that the maximum shipping space to the Middle East was available for military cargo. When the United States entered the war the Middle East Supply Centre came under joint United States and British Control. The Combined Boards set up in Washington and London, operating through the Middle East Supply Centre in the case of the Middle East, directed Middle East essential requirements to the sources best able to supply them under war time conditions. These activities tended strongly to increase the role of the United States as a supplier to Egypt.

A comparison of 1945 import and export figures with those of 1938 illustrates the above changes. The United Kingdom remains Egypt's largest supplier and best customer providing 18 per cent. of her supplies and buying 27 per cent. of her exports. The United Kingdom's exports to Egypt in 1945 at nearly £E11 millions show a large increase in value over 1938, but an increase less proportionately than the increase in the value of Egypt's total import trade. One of the chief reasons for this situation was the almost total cessation of shipments of coal from the United Kingdom, these having amounted in 1938 to nearly 1¼ million tons, valued at £E1·6 millions.

As indicated above, imports from the United States increased substantially: from under 7 per cent. of total imports pre-war to 14 per cent. in 1945. The increase by value was from £E2·5 millions in 1938 to £E8·4 millions in 1945. This increase was attained at a time when imports of motor vehicles, a principal item in pre-war imports from the United States, were suspended. Among the main items in the increase are tobacco, iron and steel manufactures, machinery, pharmaceuticals, chemicals of many kinds and textiles.

Egyptian imports have also increased substantially from Middle East territories. Imports from Iraq, Iran, Palestine and Turkey amounted in 1938 to a total of about £E1¼ millions. In 1945 these imports amounted to well over £E16 millions. These increases are mainly accounted for by large imports of petroleum products from Iraq and Iran necessitated by the drastic reduction in imports of coal; by imports of tobacco from Turkey, and to a lesser degree by increased imports from Palestine, particularly of such items as pharmaceuticals and wines.

It is to be noted that the increase in the value of imports from Middle East territories more than accounts for the increase in the value of total imports.

The destination of Egyptian exports is principally a matter of cotton. The United Kingdom continues as in pre-war days to be the principal purchaser. India and United States takings were higher in 1945 than in 1938. 1945 also saw the re-emergence of French purchases of Egyptian cotton. As stated above, rice exports have increased; the exportable surplus of rice is, and has for some years been, purchased by the United Kingdom Ministry of Food, which allocates it according to Combined Food Board decision.

Trade With the U.K.

The export of cotton from Egypt is not subject to restriction although there are certain formalities to be carried out under the Exchange Control in connection with the recovery of proceeds of exports. These formalities are not required, however, for exports to the sterling area. Egyptian opinion is already giving the most careful consideration to the future of exports of Egyptian cotton, and the British Government decision to continue centralization of future purchases of cotton for United Kingdom use has of course been the subject of the most careful attention. The United Kingdom still purchases substantial quantities of Egyptian onions for consumption in the United Kingdom, but there is no present prospect of any export from Egypt to the United Kingdom which could in any way compare in importance with exports of cotton.

As regards exports from the United Kingdom to Egypt the Egyptian demand for imports is at present, and will certainly for a considerable period continue to be, extremely large. The following factors should be taken into account. As stated above, Egypt has accumulated large sterling balances and there is a considerable amount of money in the country. Egypt has throughout the war been starved both of consumer and of capital goods, including spares, etc., necessary for the replacement of capital goods. There is thus a huge and unsatisfied demand for a very wide range of articles. Amongst items which may be specially mentioned are consumer goods of all kinds, transport equipment, agricultural machinery, pumps, electrical equipment, iron and steel, and all kinds of equipment for building.

During the war housing in Egypt as elsewhere has fallen seriously into arrears, and a very serious overcrowding problem exists in the large cities. It is for this reason that the demand for building materials is mentioned above. A really substantial expansion of building seems, however, likely to take place only when increased supplies of timber become available. Imports of timber at present amount to only a fraction of normal pre-war imports and stocks have been depleted practically to the point of exhaustion.

There are many projects at present for the institution of new industries, amongst which may be mentioned the development of industries for the production of rayon yarn (now under way), plastics, the production of artificial fertilizer and many others. These projects are for the development of light industries, although there has been discussion of the erection of a furnace for melting scrap and the production of iron and steel manufactures, and of the possibility of basing an iron and steel industry on the iron ore deposits at Aswan. It is the hope and intention of responsible Egyptian opinion that the development of industry shall assist in raising the standard of living, which as stated is at present very low for the majority of the population, and at the same time provide work for many of the men employed during the war by the military authorities. Egyptian opinion hopes that the electrification of the Aswan dam and the increase in mineral oil production will provide the power required for expansion of industry. Responsible Egyptian opinion further considers that the accumulation of funds which has taken place as a result of military expenditure during the war has provided a situation where a substantial development of industry in Egypt is for the first time financially possible.

Co-operation of Industrialists

Many of the present plans for development of industry are based upon the co-operation of British and Egyptian industrialists. This is encouraging not only because it must assist United Kingdom interests by facilitating orders for plant, etc., but because the participation of experienced manufacturers is an additional guarantee that production methods will include all the latest technical methods and experience, and that these new industries will thus be of the greatest possible benefit to Egypt. Development of Egyptian industry offers a great outlet for the supply of capital goods of United Kingdom origin, and it is to be hoped that as it tends to raise the standard of living it will at the same time increase the size of the Egyptian market for imported goods even though the nature of the goods imported will to some extent be changed.

There are also many projects for public works including electrification of the Aswan dam for which a call for tenders has recently been issued, for the building of roads, for the supply of drinking water in the villages, for the provision of public health centres, and for the improvement of public utilities including electricity supply. These projects will all call for large quantities of imported goods. There is, therefore, a large demand for imports in Egypt. Egyptian business men are in general well acquainted with British business methods and providing that the prices and delivery dates are suitable, the prospects for the future of United Kingdom exports to Egypt are promising. It is, however, most important that as often as possible British business men should visit Egypt and that they should examine on the spot the nature of the market for their goods and of the agency or other arrangements which they have made for their sale.

Facilities and Restrictions

Egypt is a member of the sterling area. There are no restrictions on remittances from Egypt to the United Kingdom. Similarly, with the exception of a very limited range of goods still in acutely critical world short supply and subject to control by the British Supply Mission, no import permits are required for the import of goods from the sterling area.

Import licensing is applied to all imports from countries outside the sterling area with the exception of certain nearby territories in the Middle East. In the case of so-called hard currency areas, namely United States, Canada, Switzerland, Sweden and Portugal, an agreement has been in force between the United Kingdom and Egypt since January 1, 1945, and has recently been extended until

(*Continued on next page*)

Purchase of Rubber from the Far East

AGREEMENTS have been reached after discussions between the U.S. Government and the Governments of the United Kingdom, the Netherlands and France regarding the purchase of natural rubber from British, Netherlands and French Far Eastern sources for the period July 1 until December 31, 1946. These bilateral discussions were occasioned by the expiration of the present contracts on June 30, 1946.

The position of each country in relation to rubber was examined most carefully and consideration was given to the immediate difficulties faced by natural rubber producing areas, together with the longer run implications of any price decision at the present time. Determining factors in the agreements reached were the continuing shortage of natural rubber in relation to demand and the present exceptionally high costs of producing natural rubber in these areas.

In accordance with the agreements reached the Governments concerned will support the continuance of allocation of natural rubber by the Combined Rubber Committee for the above period. The U.S. Government will apply to the C.R.C. for allocations for shipment during this period of 145,000 tons of natural rubber from British, French and Netherlands sources. Rubber Development Corporation will purchase the quantity of rubber allocated to the U.S. during this period at a fixed basic price of 23½ U.S. cents per pound f.o.b. Far Eastern ocean ports for No. IX ribbed smoked sheet and other grades at agreed differentials. In order to ensure the ready movement of rubber and the economical use of go-down and shipping space the United Kingdom Government will be constantly in the market to buy rubber in British Far East territories at a price equivalent to that indicated above.

The present arrangements whereby the United Kingdom Government purchases all rubber for export from Malaya and resells to the United States or other governments will cease from the end of June, 1946, in respect of shipments elsewhere than to the United Kingdom. From July 1 to December 31, 1946, the U.S. will be able to purchase rubber from Malaya in such manner as they may desire. The Governments of the Malayan Union, Singapore Colony and the British Dependencies in Borneo have been requested to prohibit the export of rubber except under licence and to relate the amount of licences for export to each destination to the quantity determined by allocation.

U.S. arrangements for procurement in Netherlands and French Far East territories are at present under discussion.

Further consultation will be held from time to time as may be necessary on the detailed arrangements required to carry out this agreement.

The arrangements already in force for the purchase of rubber from Ceylon will of course continue to the end of September 1946. A further statement regarding the position in Ceylon after that date will be made in due course.

Trade with Egypt

(*Continued from previous page*)

March 31, 1947, under which Egyptian spending power in these areas is restricted to a stated total which is calculated to be sufficient to meet Egypt's essential requirements in these areas. This agreement is subject to termination in the event of non-ratification of the United Kingdom/United States financial agreement.

During the war the absolute incidence of *ad valorem* tariffs has automatically increased *parri passu* with increases in the cost of goods. Egyptian specific duties have all been increased by 100 per cent., and certain other increases have been made in incidental dues connected with import, e.g. paving dues and special taxes. These war-time increases still remain in force.

As regards exports, as stated above, there is no export licensing applied to the export of raw cotton. Export permits are however required for nearly all goods other than cotton. The reason for export licensing is of course the shortage of goods within Egypt and the difficulty which has existed hitherto in obtaining adequate imports. The Egyptian Government is understood to be considering what relaxations can be made in the system of export licensing with a view to encouraging the development of exports of Egyptian manufactures. Certain industries which have expanded during the war are anxious to find export markets.

Canadian Export Trade January—April

THE External Trade Branch of the Dominion Bureau of Statistics, Ottawa, has prepared a summary of Canada's domestic exports (excluding gold) during the first four months of the current year. The total value of the exports during the period under review was $699,098,000 as compared with $1,080,360,000 in the first four months of 1945.

The total for agricultural and vegetable products was $178,986,000 ($161,296,000). The principal items in this group were:—fresh fruits $771,000 ($2,159,000); canned fruits, $226,000 ($334,000); fruit juices and fruit syrups, $267,000 ($603,000); fresh vegetables, $1,323,000 ($5,562,000); dried vegetables, $1,389,000 ($2,905,000); canned vegetables, $1,738,000 ($712,000); pickles, sauces and catsups, $206,000 ($301,000); grain, $89,825,000 ($72,096,000); milled products, $39,638,000 ($33,102,000); prepared foods and bakery products, $623,000 ($670,000); prepared cereal foods, $279,000 ($221,000); other farinaceous products, $2,093,000 ($1,118,000); sugar and products, $471,000 ($2,387,000); vegetable products, other, mainly food, $789,000 ($756,000); alcoholic beverages, $12,067,000 ($9,584,000); oils, vegetable, not edible, $1,387,000 ($553,000); plants, shrubs, trees and vines, $122,000 ($36,000); rubber, $7,196,000 ($10,903,000); seeds, $7,875,000 ($9,285,000); tobacco, $3,718,000 ($3,878,000); vegetable products, other, not foods, $6,662,000 ($2,985,000).

The total value of exports of animals and animal products was $119,612,000 ($130,361,000), including animals, living, $4,869,000 ($4,281,000); bones, horns and hoofs, $104,000 ($117,000); fish and fishery products, $23,982,000 ($20,219,000); furs, $16,471,000 ($11,037,000); hairs and bristles, $428,000 ($508,000); hides and skins, raw, $841,000 ($80,000); leather, unmanufactured, $1,877,000 ($1,245,000); leather manufactured, $2,050,000 ($1,021,000); meats, $50,365,000 ($63,570,000); milk and products, $5,633,000 ($7,641,000); animal oils, fats, greases and wax, $883,000 ($2,122,000); other animal products, $12,108,000 ($18,721,000).

Textiles, Wood and Metals

Fibres, textiles and textile products exports reached a total value of $18,455,000 ($25,056,000); of this total cotton accounted for $3,649,000 ($4,773,000); flax, hemp and jute, $1,095,000 ($626,000); wool, $7,534,000 ($8,171,000); artificial silk, $1,767,000 ($3,479,000); other fibres and textiles, $4,410,000 ($8,006,000).

Wood, wood products and paper exports were valued at $173,184,000 ($141,070,000); of this figure, wood, unmanufactured (including logs, planks and boards, timber, square, shingles and pulpwood) totalled $173,184,000 ($141,070,000); wood pulp, $35,164,000 ($32,646,000); paper, $82,616,000 ($59,750); books and printed matter, $1,898,000 ($1,554,000).

Exports of iron and its products were valued at $74,670,000 ($246,081,000), including ferro-alloys, $2,895,000 ($5,380,000); pigs, ingots, blooms and billets, $1,764,000 ($817,000); castings and forgings, $613,000 ($3,700,000); rolling mill products, $2,812,000 ($3,906,000); pipes, tubes and fittings, $557,000 ($1,018,000); wire, $314,000 ($926,000); engines and boilers, $12,304,000 ($5,389,000); farm implements and machinery, $10,651,000 ($5,832,000); hardware and cutlery, $1,179,000 ($1,280,000); machinery (except agricultural) $3,753,000 ($7,911,000); automobiles, freight, $17,422,000 ($97,795,000); automobiles, passenger, $373,000 ($11,000); automobile parts, $7,679,000 ($44,826,000);

As regards non-ferrous metals and their products, the total value in the first four months of 1946 was $67,907,000 ($142,050,000); includes aluminium, $6,732,000 ($60,234,000); brass, $953,000 ($2,039,000); copper, $12,339,000 ($13,493,000); lead, $5,995,000 ($1,374,000); nickel, $18,239,000 ($22,848,000); precious metals, except gold, $4,531,000 ($5,993,000); zinc, $9,891,000 ($6,435,000); electrical apparatus, $6,707,000 ($26,344,000); non-ferrous metals, $2,152,000 ($3,078,000).

The total for non-metallic minerals and their products was $14,324,000 ($15,574,000). The chief items were asbestos, $6,176,000 ($7,686,000); coal and products, $1,876,000 ($2,376,000); petroleum products, $721,000 ($1,792,000); stone and stone products, $4,070,000 ($4,724,000).

Wholesale Prices in the Netherlands

FIGURES have recently been made available relative to the index figures of the Netherlands wholesale prices for the March quarter of the current year. These figures indicate that whereas during the latter months of 1945 the rise in the general index figure and of its three components, the indexes for foodstuffs, raw materials and finished products, was fairly gradual. The January figures, however, presented a very different picture. The general index figure rose from 216·7 in December, to 236·7, that is by 20 points, while the raw materials index figure jumped from 204 to no less than 258·9. The February and March figures, on the other hand, show only unimportant rises (if not slight falls) in the general and group index figures, as can be seen from the table below :—

(July 1938-July 1939=100)

Period	General index figures	Food-stuffs	Raw materials	Finished products
May 1945	166·8	163·5	186·4	164·8
December 1945 ...	216·7	194·4	204·0	231·1
January 1946 ...	236·7	192·7	258·9	245·7
February 1946 ...	241·0	191·8	260·4	252·6
March 1946 ...	241·7	192·3	260·2	253·6

The cause of the sudden rise in January is to be found in the composition of the index figure. Owing to the fact that the greater part of the raw materials used in the Netherlands must be imported and that as a result of the great rise in prices abroad during the war and the devaluation of the guilder in relation to dollar and sterling, these imports have become considerably dearer, it was to be expected that after the liberation of the Netherlands the index figure of raw material prices would rise considerably.

Adaptation of the index figure should have taken place at the time when imports into the Netherlands were resumed. This was impossible owing to the special circumstances under which these imports took place, in particular the fact that in the beginning in many cases little was known regarding the prices of the imported goods. This particularly applies to timber and metals, imports of which were resumed rather late in any case. The result has been that while particulars regarding new prices were available at the Central Bureau for Statistics for most of the other imported raw materials during the second half of 1945 and could adapt the respective index figures accordingly, the Central Bureau for Statistics had, of necessity, for the timber and metal categories to work on the out of date and far too low prices of May 1945.

Since both these categories exercise a very considerable influence on the total raw material index figure, the result has been that in fact the latter index figure until January 1946 was much too flattering. In this connection the rise in the raw materials index figure should be observed in the above table between May and December 1945 from 186·4 to 204, that is by less than 10 per cent., which is considerably lower than the corresponding rises in the foodstuffs and finished products groups.

Rising Prices

In January, however, the Central Bureau of Statistics received also the new prices for timber and metals, which showed that the rise in the prices of these goods were exceptionally high in relation to those of other raw materials.

Commodity	May 1945	Dec. 1945	Jan. 1946	Mar. 1946
Timber	209·4	209·4	436·5	436·5
Metals	134·4	237·0	249·4	250·8
Chemicals ...	204·3	258·9	259·6	255·9
Textiles	170·0	230·3	234·8	238·1
Leather	128·0	166·8	166·8	166·8
Paper	217·3	289·8	289·6	289·4
Auxiliaries ...	155·8	151·2	151·5	151·4
Total raw materials	186·4	204·0	258·9	260·2

This clearly shows how for the other raw materials (with the exception of "Auxiliaries," which group shows no increase at all owing to the subsidising of the coal price, as a result of which the prices of coal, gas and electricity—the main items—remained stable) adaptation of the index figure to the increased prices of imports took place before January 1946, these groups showing hardly any rise since that month.

The startling January rise, therefore, is exclusively the result of belated adaptation of the timber and metal index figures in that month.

The index figures of the raw materials groups do not call for comment. As regards finished products, the index figure rose from 231·1 in December to 253·6 in March, a rise of over 22 points, which for the greater part is again accounted for by the January rise (see first Table). As will be seen from the table below, here again the index figures for wood products and metal goods account for the greater part of the rise, the rise during the period May to December 1945 having been relatively slight.

Commodity	May 1945	Dec. 1945	Jan. 1946	Mar. 1946
Glass, earthenware, etc.	160·0	197·2	214·1	223·0
Wood products ...	245·4	256·3	347·8	341·0
Chemical products	174·7	345·2	349·0	343·6
Textile products ...	205·1	268·5	291·0	302·7
Leather goods ...	217·8	264 0	265·7	279·5
Paper goods ...	154·5	266·7	266·5	253·8
Prepared Foods ...	147·2	201·5	202·8	203·3
Metal Goods ...	133·2	154·7	193·2	241·0
Total finished products ...	164·8	231·1	245·7	253·6

Indian Crops and Wholesale Prices

The Department of Commercial Intelligence and Statistics, Calcutta, reports as follows on the crops in India for the weeks ending on the dates stated :—

Madras, June 1.—Rainfall has been moderate. Standing crops are generally fair.

Bihar, June 10.—Rainfall has been light to moderate. Prospects for crops on the whole are fair.

Orissa, June 10.—There has been light to moderate rainfall over wide districts. Standing crops, including sugarcane and tobacco are generally thriving.

Punjab, June 10.—Light rainfall has fallen in parts of all districts. The condition of standing crops is unchanged.

Bengal, June 5.—Prospects for standing crops are satisfactory except for a few districts. The weeding of Aus paddy is progressing.

Bombay, June 7.—Rainfall has been adequate in Karnatak and Konkan and light scattered rains have fallen in South Gujorat and the Coccan. More rain is needed in the northern areas for kharif sowings. The harvesting of hot weather crops is progressing.

Sind, June 14.—Rainfall has been nil. Cotton sowing and paddy seedlings are progressing.

Central Provinces and Borar, June 8.—Light to moderate rain has fallen over all provinces except in the Botul, Nagpur, Akolam Amraoti and Buldana districts where rainfall has been heavy. Standing crops of sugarcane are good.

Wholesale Price Index.—The wholesale price index for May is 313, against 306 for April, based on a standard of 100 in 1914.

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Conditions in the Canadian Pulp and Paper Industry

THE *Commercial Intelligence Journal* published by the Department of Trade and Commerce, Ottawa, contains a review of the Pulp and Paper situation in Canada recently prepared in the Export Division of the Dominion Foreign Trade Service, Ottawa. The chief points were as under :—

Since January 1, 1946, export control in Canada of all pulp and paper commodities was discontinued, with the exception of kraft, paperboard, and a few converted paper items such as paper towels, small rolls of toilet paper, etc. Judging from the numerous inquiries received in the Export Division of the Department of Trade and Commerce, the impression in overseas markets appears to be that pulp and paper commodities are in freer supply than during the war years. However, this is not so and, as a matter of fact, supplies are still just as tight as, if not tighter than, at any time during the past five years. There are several reasons to account for this. The first is that, due to an early thaw in February and March, of 1945, a considerable quantity of the cut of pulpwood was left behind in the woods, with the result that there was not sufficient wood-pulp available to keep the mills operating to capacity. Last season's cut should be better, but this will not begin to reach the mills until May or June of this year. The shortage of labour for woods operations has also retarded over-all production, but this situation, it is hoped, will right itself during the coming fall and winter. Wood is the base of all pulp and paper manufacture and, if supplies are not sufficient to enable the mills to run to near capacity, all grades of paper—newsprint, kraft, fine papers, paperboard, etc.—are bound to continue in short supply.

Wartime Production

During the war Canadian pulp and paper output was greatly expanded. Indeed, increased output was a wartime essential. How the industry met the need is shown by statistics. Pulpwood production in the six war years was one-third greater than the average for the 1935-39 period. By 1942 pulp exports to Britain and the United States had doubled the 1939 figure, and total pulp exports for the past four years are more than double the 1939 figure. From 1939 to 1941, newsprint output had been increased from 2·9 million to 3·4 million tons, and the total production of other papers and paperboard from 1938 to date has almost doubled. This record was achieved despite severe restrictions in the use of hydro-electric power, much of which was diverted to essential war plants. Moreover, the industry was faced with a manpower problem, because 12,000 men, normally about one-third the working force at the mills, enlisted in the armed forces.

In a review of the "Prospects of Pulp and Paper in the Reconversion Period," Mr. R. M. Fowler, President of the Canadian Pulp and Paper Association, is quoted as follows :

"Although it is estimated that Canadian mills will in 1946 produce 28 per cent. more newsprint than in 1939, there are two important factors adversely affecting the supply situation. One is that there have been some shifts in distribution during the past six years. The other factor is the low level of newsprint stocks the world over.

"Consumers in Canada have received an average of 6 per cent. of total Canadian tonnage through the pre-war and wartime periods and will continue to receive the same share in 1946. In pre-war years, United States consumers received an average of 76 per cent. of total Canadian output and an average of 81 per cent. during the war. In 1946 the United States will continue to receive 81 per cent. of the Canadian output. Shipments to all other countries were 18 per cent. pre-war, 13 per cent. in wartime, and will remain at 13 per cent. in 1946, a drop from 1945, when they were 16 per cent. of the total.

"The wartime decline to 13 per cent. for overseas countries was due to shortage of shipping space and other factors. Continuance of this low share in 1946 and the decrease from 1945, both in tonnage and percentage, are due chiefly to post-war monetary restrictions, the 1946 position of British purchasers of Canadian supplies being an example. It is expected that overseas buyers will eventually regain their purchasing ability, and that Canadian producers will again supply their normal share of the requirements of these markets. The purchase by British publishers of 50,000 long tons of Canadian and Newfoundland newsprint during 1946 was authorized recently by the British Government. The authorization deferred, for possible shipment in 1946 and 1948, the remainder of an order for 224,000 long tons for which the British publishers had originally contracted for in 1946. Thus friendly relations between the Canadian industry and the purchasers of its products in the United Kingdom will be preserved throughout the difficult reconstruction period, a situation which should prove of increasing importance when conditions are once more normal.

"In 1946, Canadian purchasers of papers other than newsprint will be allotted, on a yardage basis, at least 25 per cent. more than in pre-war years. The amount of paper to be made available exceeds even the total for 1945, an unprecedented production year. But an increasing demand from those whose needs were curtailed by the war and from essential new users will absorb almost all the additional 1946 tonnage. Thus the supply of fine paper to wholesalers, converters, printers, and other purchasers generally can at best be only marginally higher during 1946."

Increased Demand

Before the war there was a world surplus of pulp and paper productive capacity in relation to the then world demand ; today there is an urgent need throughout the world for pulp and paper of all kinds. Pulp, originally used only in the production of paper, is in increasing demand as a raw material for the fabrication of rayon, plastics, building and packaging materials and many other products

The main wood sources are the forests of the United States, Scandinavia, Brazil, Russia, and Canada. Consumption of pulp and paper in the United States far exceeds that country's production of pulpwood. Following the reconstruction period, Scandinavia will naturally turn to meeting large demands in European countries. There is little likelihood of immediate extensive development of the industry in Brazil. Any increase in pulp and paper production in the Soviet Union could easily be absorbed within that country, and exports would be the result of government planning to provide exchange. While the situation in that country is not clear, the total tonnage involved is a very small percentage of world supply. Thus it is apparent that, at least for some time to come, the task of meeting a major portion of the world export demand for pulp and paper must fall to the Canadian industry.

It was expected that the kraft-paper situation would ease somewhat, enabling the mills to export additional tonnages in 1946. This now appears unlikely, as the heavy demand for kraft paper for the production of multiwall bags for packaging cement, flour, etc., will absorb a larger proportion of Canadian production. One of the large kraft producers on the Pacific coast has also been hampered by water and power conditions, which have reduced operations during the past two months from seven to four or five days a week.

A bright side to the picture is the steady expansion of the industry throughout Canada. Construction of many new pulp mills is either contemplated or under way, and plant renovations and improvements are being undertaken by many mills manufacturing various grades of pulp, paper and converted paper products.

However, some of these pulp mills are being constructed by large United States firms which in the past have imported their pulpwood from Canada. They foresee the time when the demand for wood required for purposes other than paper-making will make it increasingly difficult to obtain all the supplies necessary for the operation of their mills in the United States. Accordingly they have acquired, by lease or licence, large limits in Canada and have erected mills where they manufacture their own pulp and ship it to their paper mills in the United States. Canada benefits from operations of this kind in that the wood is cut and processed into pulp before export, thereby providing work for many more men than would otherwise be the case if the wood alone were exported. There is no saving of the wood itself so far as Canada is concerned.

It is expected that in 1947 there will be an even larger quantity available for export markets than ever before, but the situation during 1946 will undoubtedly be tight.

Development of Palestine's Trade in 1945

THE value of imports into Palestine during the year 1945 amounted to £P.40,691,327 as compared with £P.36,223,716 in 1944, an increase of £P.4,467,611 or 12 per cent. Compared with the figures for 1939, imports rose by 178 per cent., states the Department of Statistics, Jerusalem. The value of exports in 1945 was £P.20,395,991 as against £P.14,638,464 a year earlier, an increase of £P.5,757,527, or 39 per cent. The following table gives the values of the principal import and export classes during the year under review :—

Class	Imports	Exports
	£P.	£P.
Food, drink and tobacco ... Total	14,245,170	3,033,125
Grain and flour	6,173,052	97,581
Feeding stuffs for animals	330,063	2,994
Animals, living, for food	2,223,902	150
Dairy produce	803,535	6,907
Fresh fruits, nuts and vegetables ...	1,479,448	2,225,444
Beverages	76,852	286,161
Tobacco and tombac	494,204	149,006
Raw materials and articles mainly unmanufactured ... ... Total	16,250,911	9,869,934
Coal	101,255	—
Other non-metalliferous mining and quarry products	53,999	184
Wood and timber	382,506	—
Textile materials	452,411	35,359
Seeds, beans, nuts for oil, oils, fats, gums and resins	10,941,107	3,734,377
Hides and skins, undressed... ...	466,712	13,238
Articles wholly or mainly manufactured Total	8,303,901	7,471,435
Ceramic ware, glass and manufactured quarry products	127,578	401,713
Iron and steel and manufactures thereof	744,835	134,119
Non-ferrous metals and manufactures thereof	210,762	135,145
Cutlery, hardware, implements, instruments and photographic films	340,992	74,649
Electrical goods and apparatus ...	151,284	56,758
Machinery	694,131	50,790
Manufactures of wood and timber	501,879	7,902
Cotton yarns and manufactures ...	1,040,929	33,328
Woollen and worsted yarn, and manufactures thereof	285,934	3,446
Silk yarn, artificial silk yarn and manufactures thereof	305,016	19,496
Manufactures of textile materials, other	292,151	2,610
Apparel	356,159	945,226
Chemicals, drugs, dyes and colours	1,158,371	1,623,400
Oils, fats and waxes, manufactured	253,634	3,013,324
Leather and manufactures thereof...	97,282	224,512
Paper and cardboard, and manufactures thereof	334,067	26,150
Aircraft, ships and vehicles ...	380,646	19,365
Rubber manufactures	357,244	25,177
Animals, living, N.E.S.	290,246	190

Distribution of Trade

British Empire and Mandated Territories supplied imports to the value of £P.16,526,902 in 1945, of which the United Kingdom supplied £P.4,228,013. Other suppliers were Australia and New Zealand, £P.517,665 ; British India, £P.2,047,035 ; Canada, £P.2,522,426 ; Ceylon, £P.144,892 ; Cyprus, £P.617,546 ; Sudan, £P.487,598 ; Transjordan, £P.1,783,194, and the Union of South Africa, £P.3,316,498.

Foreign sources included : Bulgaria, £P.50,826 ; Portugal, £P.463,347 ; Russia, £P.83,736 ; Sweden, £P.41,674 ; Switzerland, £P.87,450 ; Abyssinia, £P.315,167 ; Egypt, £P.1,312,921 ; Arabia, £P.155,937 ; Iraq, £P.12,258,395 ; Iran, £P.312,645 ; Syria (including Lebanon), £P.1,623,008; Turkey, £P.2,562,176 ; Argentina, £P,45,998 ; the United States, £P.4,455,911.

As regards exports, the British Empire and Mandated Territories took Palestine produce to the value of £P.2,126,101, of which amount the United Kingdom absorbed £P.2,890,590 ; Australia and New Zealand, £P.93,267 ; British India, £P.963,608 ; Canada, £P.89,840 ; Ceylon, £P.62,535 ; Cyprus, £P.346,423 ; Malta, £P.61,148 ; Transjordan, £P.727,350 ; Belgium, £P.57,957 ; Bulgaria, £P.51,453 ; Greece, £P.57,735 ; Italy, £P.170,860 ; Russia, £P.44,655 ; Sweden, £P.192,398 ; Yugoslavia, £P.87,708 ; Algeria, £P.215,890 ; Egypt, £P.5,382,287 ; Tripolitania, £P.56,492 ; Tunisia, £P.147,498 ; Arabia, £P.44,288 ; Iraq, £P.670,059 ; Iran, £P.313,192 ; Syria (including Lebanon), £P.1,431,488 ; Turkey, £P.952,444 ; the United States, £P.4,894,794.

Fishery Statistics

The following table gives particulars of the value of fish landed during 1945, together with comparative figures for previous years.

Period	Lake fish	Pond fish	Sea fish landed		Total value of fish landed
			by local fishermen	by foreign fishermen	
	£P.	£P.	£P.	£P.	£P.
1941	16,000	8,200	72,700	—	96,900
1942	35,500	65,100	259,700	100	360,400
1943	49,000	170,000	518,600	2,200	739,800
1944	70,000	302,900	740,700	11,800	1,125,400
1945	79,300	504,400	551,500	10,600	1,145,800

Crop Estimates

Estimates of the Department of Agriculture and Fisheries show the following production figures for cereals, fodder, tobacco and vegetables and fruits, other than citrus :—

Particulars	1944	1945
	tons	tons
Wheat	57,456	58,355
Barley	41,482	74,906
Durrah	24,569	37,311
Maize (for seed)	3,366	5,289
Sesame	6,388	4,726
Kersenneh	10,273	11,264
Fodder for dairy industry	209,987*	201,112†
Tobacco	1,683	—
Potatoes	51,559	32,816
Tomatoes	57,648	60,457
Melons and water melons	102,502	142,827
Olives	9,968	79,469
Grapes	45,251	45,634
Bananas	7,584	8,143
Figs, almonds and other fruit (non-citrus)	36,256	40,941

* 188,513 tons of green fodder and 21,474 tons of dry fodder or hay.
† 178,594 tons of green fodder and 22,518 tons of dry fodder or hay.

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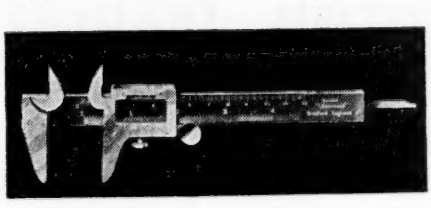

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Canadian "Sterling" Position, 1939-1945

THE Foreign Exchange Control Board, Ottawa, have submitted to the Minister of Finance a report covering the main aspects of the Board's operations to the end of 1945. The report indicates § that the balance of Canadian long-term indebtedness to the United Kingdom was substantially reduced between 1939 and 1945. At the outbreak of war investments in Canada, including fixed investments, held in United Kingdom names (including those held by United Kingdom nominees on behalf of beneficial owners resident in other countries) amounted to approximately $2,500 million at book values. The following table gives further particulars of such investments :—

Foreign investments in 1939*	U.S.A.	U.K.†	All other countries†	Total
	million dollars			
Government securities ...	1,241	408‡	23	1,672
Public utilities	1,059	1,340	95	2,494
Industrial and commercial	1,604	377	51	2,032
Financial institutions ...	201	221	51	473
Miscellaneous assets ...	85	120	50	255
Total	4,190	2,466	270	6,926

Excluded from the table below are fluctuations in cash balances, which would increase the figure for 1941 and reduce the figure for 1942, but would not affect the grand totals. Also excluded are several intergovernmental liabilities whose final amount and settlement have not yet been determined, e.g. the balances due from the United Kingdom to Canada with respect to the Commonwealth Air Training Plan and the interim advances made by Canada to the United Kingdom under the War Appropriation Act of 1945, and the balances due from Canada to the United Kingdom with respect to Army capitation payments.

The principal reduction resulted from official repatriation of Canadian securities held in the United Kingdom which has amounted to $703 million. In addition, other Canadian repurchases of Canadian securities held in Britain were substantial and there were appreciable redemptions of provincial, municipal and corporation securities maturing or called during the war.

Other forms of private Canadian liabilities to the United Kingdom increased slightly on balance, representing mainly a small portion still unliquidated of the advances made by the British Government for the expansion of production of materials urgently needed for the war. Reductions in Canadian liabilities to the United Kingdom totalled $958 million to the end of 1945. In addition, Canada's assets increased. In the first place, there has been the loan of $700 million to the United Kingdom, of which $561 million was outstanding at the end of 1945. When some other increases in Canadian assets in the United Kingdom, rising mainly from the temporary blocking of certain capital receipts made necessary by the shortage of dollars, are added to the total, the increase in Canadian claims against the United Kingdom is $573 million, bringing the total ascertained reduction in the balance of Canadian indebtedness in the United Kingdom to over $1,500 million to the end of 1945.

It should be noted that these figures are exclusive of certain intergovernmental liabilities whose final amount and method of settlement has not yet been determined.

War-Time Changes

The war-time changes in the balance of Canadian indebtedness to the United Kingdom to the end of 1945 were as under :—

Particulars	Sept. 15 to Dec. 31, 1939	1940	1941	1942	1943	1944	1945	Total to end of 1945
	million dollars							
Reduction in Canadian liabilities to U.K. (minus sign indicates increase in Canadian liability) :								
Official Repatriation of Canadian securities	75	137	188	296	4	2	1	703
Private Redemption of Canadian securities	2	13	10	30	10	32	32	129
Other Purchases of Canadian securities ...	1	28	36	8	26	27	32	158
Other indebtedness	—	—36	7	—13	4	3	3	—32
Total reduction in Canadian liabilities ...	78	142	241	321	44	64	68	958
Increases in Canadian assets in U.K. (minus sign indicates reduction in Canadian assets) :								
Loan to Government of the U.K. ...	—	—	—	700	—18	—57	—64	561
Other assets	— 1	— 6	— 1	6	7	8	— 1	12
Total increase in Canadian assets	— 1	— 6	— 1	706	—11	—49	—65	573
Net reduction in balance of Canadian indebtedness	77	136	240	1,027	33	15	3	1,531

* Source—Dominion Bureau of Statistics. † An unascertainable amount of investment beneficially owned in countries other than the United Kingdom was held by U.K. nominees and hence appears in the U.K. column. ‡ After repatriation of $75 m.m. in latter months of 1939. § Section IVa, "Survey of Sterling Position, 1939-45."

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Conditions in the French Leather Industries

A MEMORANDUM on the French leather industries recently published by the *Evolution Hebdomadaire de la Situation Economique* issued by the Ministry of National Economy, indicated that the general position of the industries has improved during recent months. All difficulties have not yet been overcome but production programmes are proceeding satisfactorily and output is gradually approaching the 1938 level, at least as regards the most essential branches. The following table shows the monthly collection of raw hides and skins since October 1945 :—

Period	Hides	Skins	Sheep-skins	Horse-hides	Lamb-skins
	tons	tons	units	units	units
November, 1945	6,490	1,464	188,282	17,367	25,368
December 1945	9,111	1,567	229,274	26,497	31,670
January 1946	7,776	1,473	154,518	23,092	11,721
February 1946	7,350	1,570	117,000	23,200	24,051
March 1946	6,279	1,805	113,000	19,530	70,000

The relatively high figures for December are due to a sudden release of stocks following a period of hoarding in expectation of a rise in prices. The chief developments during the first quarter of 1946 were :—A drop in the collection of hides due to the slowing down of slaughterings on the meat market ; a fall in the collection of sheepskins to the extent of 50 per cent. over a four months' period due to diversion of crop to the black market ; an increase in the collection of calf skins due to the suppression of the system whereby all skins from other than recognized slaughter-houses were classed together in one category and an advance in the collection of lambskins which is partly seasonal and partly due to efficient investigations by special missions.

About 20 per cent. of the total collection proceeds from clandestine slaughtering.

Apart from the collection in Metropolitan France, mention should be made of the imports of raw hides and skins during the period November 1945 to March 1946, as follows :—November, 1,306 tons ; December, 1,673 tons ; January, 1,540 tons ; February, 1,337 tons ; March, 3,152 tons.

The March total consisted of 3,000 tons of hides from Argentina and the United States ; 45 tons of horsehides, 57 tons of sheepskins and 30 tons of goatskins, all of which came from Algeria with the exception of one lot of goatskins from India.

Tanning Industry

The following table shows the monthly output of tanned hides and skins from November 1945 to March 1946, as compared with the 1938 monthly average :—

Period	Cow and Ox hides	Calfskins	Horsehides	Sheepskins	Goatskins	Kidskins
	tons	sq. dcms.	sq. dcms.	units	sq. dcms.	sq. dcms.
Monthly average, 1938	5,704	51,863,360	2,011,286	1,250,100	16,470,531	19,633,219
November 1945	3,315	43,956,781	4,999,325	157,224	2,173,854	3,001 296
December 1945	2,984	44 901 191	3,916,316	172 661	1,252,476	3,383,146
January 1946	3,407	48,604,532	5,997,899	180,295	1,743,301	3,072,510
February 1946	3,508	49,473,033	5,939,548	251,175	2,185,787	3,410,381
March 1946	3,905	51,893,145	6,376,303	500,000	2,567,105	3,880,613

In March the percentages of output as compared with 1938 were as follows :—cow and ox hides, 68·46 per cent. ; calfskins, 100·05 per cent. ; horsehides, 317·02 per cent. ; sheepskins, 39·99 per cent. ; goatskins, 15·58 per cent. ; kidskins, 19·70 per cent. The considerable increase in March in all categories is due to bigger supplies to tanners and large releases from stock.

As regards supplies of tanning materials, the general situation is satisfactory. The production of pure tanning in Metropolitan France rose to 403 tons in October last and 764 in November, 1,091 in December and 1,259 in January 1946. A slight decrease was visible in February (1,242 tons) and March (1,204 tons). Since, however, it is expected that the next crop will be insufficient for requirements, it is hoped that the recent arrivals of imported materials will continue both for quebracho extract and miscellaneous materials such as mimosa bark, valonea, sumac, etc.

As regards quebracho extract, the 1945 programme, which was long delayed by strikes in Argentina, was completed during the first quarter of 1946 and a beginning was made on the 1946 programme ; by the end of March arrivals totalled 7,350 tons.

While requirements of tanning materials are thus covered in the main, supplies of chrome are still insufficient, and at the end of February there was a considerable lag in the import programme. The situation has since improved, however, and the priorities given to certain tanneries obviate the necessity to close down certain factories. Supplies of sulphur are apparently short and the coal situation is improving, the allocations for June being 9,020 tons of coal and 430 tons of other coal products. Increased allocations of cement and colouring materials have also been made. The greatest difficulties concern supplies of fats. The allocations for the second quarter of 1946 are below those for the two preceding quarters and improvement depends entirely on imports of ox-foot oil.

The situation in the leather dressing branch of the industry is still difficult, due to the poor collection of sheep-skins, which in turn is due to the absence of a fixed price scale.

Footwear Production

The following table shows the output of the various types of footwear from November 1945 to March 1946—the figures represent pairs of boots and shoes :—

Particulars	November, 1945	December, 1945	January, 1946	February, 1946	March 1946
	pairs	pairs	pairs	pairs	pairs
Men's { Working boots ... ... / Ordinary shoes ... ... / Fancy type	688,952	580,504	634,199	762,383	768,000
Women's { Working boots ... ... / Ordinary shoes ... ... / Fancy type	919,811	803,325	849,675	966,500	1,030,800
Youths and girls (ordinary and fancy) ...	292,034	280,282	340,872	384,205	387,000
Children's (ordinary and fancy)	329,304	276,037	337,385	345,256	303,600
Small children's	135,077	111,649	125,974	125,976	116,900
Babies'	168,709	155,328	170,758	209,973	198,700
Kneipps	—	—	—	89,842	213,700
Galoshes	720,595	674,316	733,664	768,909	768,481
Total	3,254,482	2,881,441	3,192,527	3,653,044	3,789,181

(*Continued on next page*)

French Leather Industry

(*Continued from previous page*)

With the exception of a slight fall at the end of 1945 due to the electricity crisis, the situation has been gradually improving, and the programme drawn up for the manufacture of a minimum of 40,000,000 pairs of boots and shoes during 1946 is proceeding according to schedule. The total output is continuously increasing, and in March the ratio of monthly activity to that of 1938 was 68 per cent. for men's footwear, 51 per cent. women's, 367 per cent. for galoshes and 105 per cent. other categories.

As will be seen, a particular effort has been made in the production of galoshes and in the production of children's shoes, thanks to which it has been possible to alter the rationing system of purchase by special permits (bon d'achat) to a system of coupons such as obtains in England. The system of " bons d'achat " is still retained as regards men's and women's footwear, but these permits are now given very liberally. Moreover, the manufacture of wooden sole shoes was discontinued at the end of 1945 and replaced by that of rubber soles. The general quality has also been improving and although the choice of skins for upper leathers is still very restricted, to the above figures must be added manufactures for the Army, which amounted to 95,965 pairs in the month of March (this has been decreasing month by month), and for administrative services (18,191 pairs mid-March).

The production of slippers, which is not included in the above table, has been rising following a temporary crisis at the end of 1945, although activity is only 39·7 per cent. of the 1938 figure. Figures for November 1945 to March 1946 are as follows:—November, 1,787,780 pairs; December, 1,587,945 pairs; January, 1,747,777 pairs; February, 2,238,075 pairs; March, 2,277,687 pairs.

Other Industries

Gloves : There is a crisis in this branch of the industry owing to the poor collection of small skins, although some steady improvement has taken place. At the beginning of 1946, each glove manufacturer received an allocation of four dozen skins per month, the skins being distributed on the basis of 1938 activities. The improvement in the collection of lambskins and in imports from Corsica has enabled the basic allocation to be increased to 15 dozen skins.

Fancy Leather Goods : The allocation of skins for the first quarter of 1946 was about 25 per cent. of the 1938 figure, and consisted chiefly of sheep, lamb and goatskins. Manufacturers have not been able to satisfy all the demands from abroad, the United States in particular. Allocations of skins for the second quarter are considerably better and among other articles, exports of 255,000 ladies' handbags are programmed.

Belting and Industrial Leathers : Production has shown a continuous increase as will be seen from the following table :

Period	Belting	Industrial leather articles
	tons	tons
November 1945 ...	90·8	55·7
December 1945 ...	92·5	56·02
January 1946 ...	99	66
February 1946 ...	101	61
March 1946 ...	118	68

The March output of belting is 102 per cent. of the 1938 figure but the production of other leather articles is only 45 per cent.

Shoe Repairs : The situation has progressed favourably and allocations for the first quarter of 1946 provide for 16,000,000 repairs in leather or rubber. Supplies of rubber and nails to dealers have increased although leather supplies are still short and needles and abrasives are in very short supply. The second quarter's allocations to cobblers are satisfactory.

Harness making : Leather allocations for this purpose have now reached 60 per cent. of the 1938 figure, which is satisfactory to most manufacturers.

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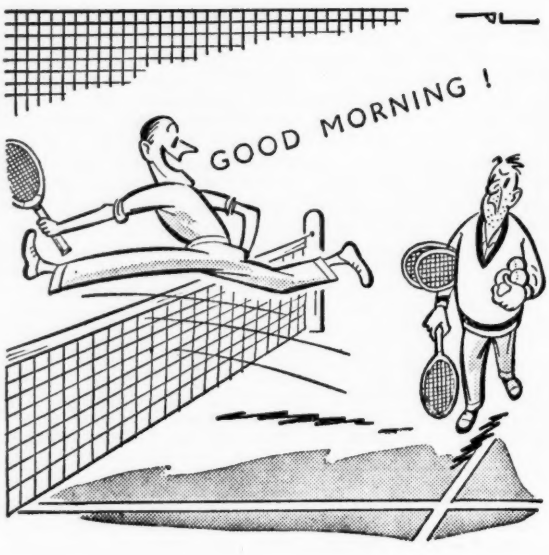

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Growth of New Zealand Exports in 1945

THE Census and Statistics Department, Wellington, has published statistics which show that imports during 1945 were valued at £55,072,928, this figure falling well below the abnormal totals for 1943 and 1944, which were swollen by the high quantities of defence materials, etc., imported during those years. Compared with 1944, the 1945 total showed a decrease of £31,613,603, while compared with 1943 there was a decrease of £40,169,402.

The aggregate value of merchandise exports for the calendar year 1945 was £81,536,431, which is £3,749,485 above the total for 1944 and £251,794 in excess of the previous record established in 1942. It should be noted, however, that re-exports amounted to £3,033,485 in 1945, £6,143,608 in 1944 and only £739,063 in 1942, so that the value of New Zealand produce exported in 1945 exceeded the corresponding figure for 1944 by £6,859,608, but was £2,042,628 less than in 1942.

Chief Exports

The following table shows the values of the principal commodities exported in 1945, together with the comparative figures for 1944 :—

Commodity	1944	1945
	£	£
Butter	18,553,484	19,277,704
Butter fat, dry	7,471	6,157
Cheese	7,443,632	9,519,363
Dried milk	496,960	575,838
Milk and cream, preserved, condensed, etc.	37,756	443,872
Frozen beef	137,882	1,122,127
Frozen lamb	9,643,664	12,335,465
Frozen mutton	1,828,306	2,791,024
Frozen pork	160,149	347,015
Frozen veal	179,390	346,504
Other frozen meats	532,617	656,848
Dehydrated meats	218,953	25,038
Canned meats	552,391	675,088
Meat extract	55,934	32,949
Sausage casings	1,027,517	1,087,451
Biscuits	632,398	923,449
Peas	271,988	507,101
Calf skins	431,207	391,313
Cattle hides	468,353	649,135
Opossum skins	116,349	217,573
Rabbit skins	974,909	1,204,791
Sheep skins—with wool	385,385	402,644
Sheep skins—without wool	2,001,263	1,999,606
Wool	12,711,407	12,661,244
Linen flax (pure and tow)	511,758	252,258
Clover seed	689,965	709,840
Grass seed	763,125	1,085,500
Tallow	608,263	844,318
Gold	1,423,556	1,262,884
Silver	26,641	10,441
Timber—sawn	59,727	71,422

Distribution of Trade

The trade (excluding specie) of the Dominion during the twelve months ended December 31, 1945, was chiefly distributed as follows :—

Imports : British Empire countries, £67,643,004, of which the United Kingdom supplied £58,385,385 ; Ceylon, £280,303 ; India, £2,537,741 ; the Union of South Africa, £180,721 ; Canada, £2,151,981 ; Australia, £3,408,545 ; Fiji, £262,799 ; Tonga, £53,030 ; Western Samoa; £148,783.

The leading foreign suppliers were Egypt, £2,473,084, the United States, £7,934,881 and the Society Islands £143,727.

Exports : Empire countries absorbed exports to the value of £38,133,210, of which the United Kingdom took £19,835,980 ; Ceylon, £868,419 ; India, £2,640,100 ; British West Africa, £239,280 ; the Union of South Africa, £241,571 ; British West Indies, £61,654 ; Canada, £5,086,719 ; Australia, £8,319,631 ; Fiji, £529,254 ; Western Samoa, £155,039.

The chief foreign buyers were Switzerland £220,714 ; Portugal, £24,838 ; Spain, £20,042 ; China, £35,120 ; Iraq, £61,366 ; Egypt, £26,678 ; Argentina, £37,982 ; Brazil, £28,318 ; Chile, £42,679 ; Peru, £1,656,219 ; the United States, £13,072,365 ; Tuamotu Archipelago, £624,565.

Grain Estimates, 1945-46

The following estimated average yields per acre of wheat, oats and barley for the season 1945-46 have been compiled from reports furnished by officers of the Department of Agriculture throughout the Dominion. The forecasts are based on crop prospects at the end of January. Actual average yields per acre for the season 1944-45 are also given for the purpose of comparison :—

District	Wheat	Oats	Barley
	Bushels per acre		
North Island	38	41	49
Marlborough	33	38	39
Nelson	30	34	35
Canterbury	31	42	46
Otago	40	52	40
Southland	48	59	38
Average (estimated) for the Dominion	33	48	43
Previous season's averages (actual)	38·02	54·18	37·11

The estimated yield per acre of wheat shows a fall of 5 bushels as compared with last season's actual ascertained average of 38·2 bushels, while the estimated area to be threshed is the lowest since 1925-26, and shows a decline of 22,000 acres on the area threshed in 1944-45. The relative figures are set out in the following table, which shows also the total yield of grain expected to be harvested. Last season's ascertained results are given for purposes of comparison, and ten-year averages of ascertained crop results are also given :—

Wheat directed	Yield per acre	Area for threshing	Total yield
	Bushels	Acres	Bushels
Estimated, 1945–46	33·00	162,000	5,400,000
Ascertained, 1944-45	38·02	183,886	6,992,204
Ascertained yearly averages, 1935-36 to 1944-45	33·19	230,906	7,664,253

In the case of oats, the estimated yield per acre shows a fall of 6 bushels as compared with last season's ascertained average yield of 54·18 bushels. The average yield of 47 bushels experienced during the last ten seasons is approximately one bushel below the present estimate.

The area from which oats were threshed for the five seasons ending with 1944-45 averaged 25 per cent. of the total area under this crop. Assuming that a similar proportion is threshed this year, the total yield of grain would be approximately 2,400,000 bushels, as against 4,209,143 bushels for the season 1944-45.

Barley, at 43 bushels per acre, is estimated to yield nearly six bushels per acre more than last season's harvest produced. Over the last five seasons the proportion of the barley area threshed averaged 81 per cent. of the total area grown. If a similar proportion is threshed this year, the total yield would be approximately 2,100,000 bushels, compared with 1,384,957 bushels for 1944-45.

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Kenya and Uganda Overseas Trade in 1945

IMPORTS into and exports from Kenya and Uganda during 1945 were valued at 285,021,129 shillings and 314,634,615 shillings, while re-exports totalled 69,863,838 shillings, stated the report of the Commissioner of Customs, Mombasa.

The chief imports during the year under review were fruits, preserved, dried and fresh, Sh.1,405,526; milk, condensed or otherwise preserved, Sh.815,409; spices, Sh.1,049,857; spirits, Sh.3,707,352; wines, Sh.698,154; cigarettes, Sh.927,713; tobacco, Sh.5,061,873; cement, building, Sh.2,530,421; tubes, pipes and their fittings, Sh.3,308,242; iron and steel manufactures, Sh.9,324,416; shovels, spades, axes, matchets and hoes, Sh.2,549,348; hardware, cutlery, etc., Sh.3,898,246; electrical goods, Sh.3,326,812; machines and machinery, Sh.13,702,720; cotton piece goods:—(a) grey unbleached (i) Americain, Sh.10,738,217; (ii) grey drill, Sh.4,437,649; (b) bleached Sh.8,366,778; (c) printed (i) khangas, Sh.275,360; (ii) other sorts, Sh.8,037,716; (d) dyed in the piece (i) khaki drill, Sh. 3,889,731; (ii) other, Sh.5,282,204; (e) coloured (manufactured wholly or in part of dyed yarn), Sh.8,567,997; cotton blankets, Sh.3,951,441; woollen and worsted goods, Sh.2,072,225; jute bags and sacks, Sh.4,067,520; artificial silk piece goods, Sh.3,236,084; other manufactures of ordinary textile materials, Sh.6,645,013; apparel, Sh.6,968,967; drugs, medicines and medicinal preparations, Sh.4,426,796; paints, colours and varnishes, Sh.1,444,347; other chemicals, Sh.2,184,914; fuel oil, Sh.6,743,757; lubricating oil, Sh.3,262,762; motor spirit (petrol) Sh.17,437,879; mineral oil, illuminating or burning (kerosene) Sh. 3,160,110; stationery and paper manufactures, Sh.8,305,432; cycles, not motor, Sh.1,168,486; motor lorries, Sh.2,325,986; other motor vehicles and motor vehicle parts, Sh.5,430,162; other vehicle parts and accessories, Sh.5,156,001; tyres and tubes, Sh.6,736,180; bullion and specie, Sh.14,530,258.

Exports and Re-Exports

The values of the chief commodities in 1945 are shown in the following table:—

Commodity	Exports	Re-exports
	Shs.	Shs
Wheat	3,326,371	391,364
Maize	9,473,650	4,788
Wheat meal and flour	3,079,232	—
Bacon and ham	517,099	—
Ale, beer and stout	362,258	187,500
Butter	1,968,013	—
Chillies	885,693	3,289
Rice	878	99,167
Coffee, raw	36,027,813	22,446,720
Ghee	390,176	205,698
Milk, condensed or otherwise preserved	139 103	150,925
Potatoes	1,243,774	—
Sugar, refined	4,504,671	—
Tea	13,059,640	850
Cigarettes	13,472,328	363,379
Tobacco	250,224	106,274
Wood and timber	962,251	5,500
Tin ore	1,017,882	903,505
Wolfram ore	432,006	—
Raw cotton	142,611,588	1,475,412
Flax, fibre and tow	1,662,787	—
Sisal fibre and tow	15,931,832	—
Seeds, cotton	2,844,810	—
Hides, dry and dry salted	4,317,855	456,738
Skins, sheep and goat	2,094,622	229,435
Rubber	1,234,241	63,259
Mangrove bark	62,425	121,007
Wattle bark	1,788,951	17,544
Wattle extracts	3,302,043	—
Ivory, elephant	1,136,151	1,965,522
Pyrethrum	16,050,471	168,461
Papain	71,221	753,741
Sodium carbonate	6,998,857	—
Cotton piece goods:—		
(a) Grey, unbleached:		
(i) Americain	—	828,647
(ii) Grey drill	—	123,569
(b) Bleached	—	721,281
(c) Printed:		
(i) Khangas	—	29,682
(ii) Other sorts	—	215,791
(d) Dyed in the piece:		
(i) Khaki drill	—	45,404
(ii) Other	—	356,215
(e) Coloured (manufactured wholly or in part of dyed yarn)	—	830,467
Cotton blankets	—	681,051
Jute bags and sacks	—	837.719
Fuel oil	—	5,356,131
Motor spirits (petrol)	—	6,491,273
Mineral oil, illuminating or burning (kerosene)	—	1,819,540
Soap	150,154	24,161
Motor cars	—	350,326
Animals, not for food	227,413	—
Gold bullion	6,773,753	259,713

Destination of Exports

The principal recipients of exports were the United Kingdom, Sh.69,581,111; Aden, Sh.788,609; Ceylon, Sh.1,081,817; India, Sh.115,252,914; the Union of South Africa, Sh.33,118,302; Southern Rhodesia, Sh.3,885,184; Zanzibar, Sh.5,229,207; Mauritius, Sh.2,464,458; Seychelles, Sh. 879,730; Australia, Sh.6,680,572; Anglo-Egyptian Sudan, Sh.10,244,136; Tanganyika Mandated Territory, Sh.24,263,351; Denmark, Sh.1,088,820; Egypt, Sh.3,742,343; the United States, Sh.23,255,691; Argentina Sh.1,484,475; Belgian Congo, Sh.3,210,343; Southern Somalia, Sh.1,474,632.

Re-exports of imported merchandise went chiefly to the United Kingdom, Sh.9,022,667; India, Sh.4,027,554; Union of South Africa, Sh.11,648,713; Zanzibar, Sh.862,699; Mauritius, Sh.526,370; Australia, Sh.3,105,395 Anglo-Egyptian Sudan, Sh.1,710,723; Tanganyika Mandated Territory, Sh.21,436,831; Denmark, Sh.1,008,000; Egypt, Sh.1,076,956; the United States, Sh.523,374; Madagascar, Sh.1,215,010; Southern Somalia, Sh.3,221,984.

Nyasaland Trade in March Quarter

Returns compiled by the Comptroller of Customs, Limbe, show that imports into and exports from Nyasaland during the three months ended March 31, 1946, were valued at £322,772 and £457,283, as compared with £287,118 and £450,343, respectively.

The values of the chief imports (not including goods in transit) were grain and flour, £1,157; provisions, preserved, tinned or bottled fruit, meat, fish, etc., £6,255; salt, £5,060; spirits, £3,742; sugar, £14,344; wines, £1,706; coal, £3,055; earthenware and chinaware, £4,781; glass and glassware, £1,122; iron, steel, other metal and manufactures thereof, £7,188; agricultural machinery and implements, £6,944; machinery, £9,145; wood and timber, manufactures of, £7,021; cotton manufactures, £157,100; woollen manufactures, £1,276; linen, hemp and jute manufactures, £5,160; apparel, haberdashery and millinery, £3,314; petrol, £8,989; oil and grease, non-edible, £8,167; leather and manufactures thereof, £2,636; paper, stationery, ink, etc., £5,813; vehicles and parts thereof, £10,178; railway and tramway rolling stock and materials, £5,702.

As regards exports (not including goods in transit) the principal items were:—Rice, £2,640; tobacco, leaf, dark fired, £59,867; tobacco strips, dark fired, £15,181; tobacco, flue cured, £900; tobacco, air cured, £969; tea, £297,251; fish, £1,632; beans, £14,362; vegetables, £1,013; cotton, £30,702; cottonseed, £955; groundnuts, £4,481; rubber, £975; soya beans, £1,310; sisal rope, £3,509; tung oil, £3,495; nicotine sulphate, £2,052; wood and timber, £1,370; wood and timber manufactures, £1,062.

Canada's External Trade in March

CANADA'S external trade in March, excluding gold, was valued at $319,922,000, as compared with $271,731,000 in February and $439,493,000 in March 1945, according to figures released by the Dominion Bureau of Statistics, Ottawa. The decline of 27 per cent. as compared with the corresponding month of last year was more moderate than that recorded for February and was due, as in that month, to the virtual cessation of shipments of war materials and equipment. For the first quarter of the current year external trade aggregated $923,306,000, as against $1,155,775,000 for the similar period of 1945.

Domestic merchandise exports from Canada were valued at $178,377,000, as compared with $301,175,000 in March 1945, a decline of $122,798,000, as against a drop of $119,571,000 in total trade. Exports in the iron, non-ferrous metals and miscellaneous groups of commodities were sharply lower, while advances were recorded for agricultural and vegetable products and wood and paper products.

March exports of foreign commodities amounted to $1,595,489, as compared with $5,831,459 in March 1945. The three-month total was $5,440,565, as against $13,193,598 for the first quarter of 1945.

Canada's merchandise imports in March were valued at $139,949,000, as compared with $116,996,000 in February and $132,486,000 in March 1945. The total for the first three months of the current year was $397,255,000, as against $374,544,000 for the corresponding period of 1945.

Direction of Trade

Imports from the United States were lower at $100,132,000, as against $105,334,000 in March 1945, the total for the three months of the current year being $283,583,000, as against $299,954,000 last year. Imports from the United Kingdom advanced in value to $14,435,000, as compared with $9,284,000 last year, and the three months' total to $47,496,000, as against $25,418,000 for the similar period of 1945.

Among British Empire countries, imports from British India were valued at $2,141,000 ($3,099,000 in March 1945); Australia, $2,002,000 ($1,713,000); British Guiana, $1,018,000 ($860,000); British East Africa, $983,000 ($152,000); New Zealand, $842,000 ($137,000); and British South Africa, $730,000 ($510,000).

Among foreign countries, commodity imports from Mexico were valued at $2,105,000 ($1,687,000); Venezuela, $1,384,000 ($926,000); Honduras, $1,370,000 ($659,000); Brazil, $732,000 ($451,000); Colombia, $658,000 ($1,062,000); Guatemala, $652,000 ($47,000); Switzerland, $687,000 ($453,000).

Information for U.K. Exporters

As an information service to exporters, details are given below of enquiries received from overseas for United Kingdom products. Manufacturers and exporters may obtain the names and addresses of the persons or firms referred to by applying to the Export Promotion Department, 35 Old Queen Street, London, S.W.1 (and quoting the reference number).

Plant and Machinery : India.

An Indian State Government wishes to receive from United Kingdom suppliers prices, delivery dates etc., for the following goods:

Market garden tractors (10 h.p. and less), lawn mowers, horticultural and insecticide sprayers, works trucks, winches, well-drilling machinery, wheelbarrows, grain milling machinery, plantation machinery, complete cement-making machinery, (with full particulars in detail), crushing and screening plant (with full particulars in detail), aerial ropeways, with capacity and other accessories, locomotives and wagons (narrow gauge), electric hoist blocks and pulley blocks, diving equipment, oil refinery plant and pipeline plant, glass working machinery and plant, internal combustion engines (with capacity and other particulars), machine knives (with particulars and their uses), metalliferous mining machinery (mineral, crushing, grinding screening. Classifying and milling plant etc. Dredging equipment).

Brick and tile machinery, power transmission, including gears, pumps and valves, iron and steel foundry plant, steam engines. (E.P.D. Reference 18721/1/46).

Milk Cans and Tiles : Palestine

A firm in Palestine wish to import from the United Kingdom milk cans, acid proof floor tiles and acid proof glazed wall tiles (E.P.D. 17099/1/46).

Building Steel and Other Materials : Peru

The First Secretary (Commercial) to H.M. Embassy at Lima has reported that the Peruvian Ministry of Public Works are anxious to obtain quotations for the supply of various articles including sanitary fixtures, structural building steel, asphaltic tiles, industrial-type metal window frames, window panes, plumbing materials, locks and hinges. Any United Kingdom manufacturer in a position to quote for these requirement may inspect the specifications, forwarded by the First Secretary (Commercial), on application to Room 60, E.P. Department, 35 Old Queen Street, London, S.W.1. Interested firms would be well advised to send their quotations (c.i.f. Callao) by air mail (E.P.D. Reference 19161/46).

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EXPORT. Manufacturers wishing to develop an Overseas Trade may utilise the Organization of C. A. Sayer & Co., EXPORT AGENTS, 22/24 Kensington Church Street, London, W.8.

Customs Regulations and Tariff Changes

Eire Customs Tariff Modifications

THE United Kingdom Trade Commissioner at Dublin has forwarded a copy of an Order, entitled "Emergency Imposition of Duties (No. 226) Order, 1946" issued by the Eire Revenue Commissioners which provides for the following modifications to the Eire Customs Tariff, effective from May 18, 1946:—

Ref. No.	Head of Duty		Rates of Duty	
			Full	Preferential
	The following items now read as follows:—			
266/1	(1) An assembly of component parts of wireless telegraphy apparatus which, in the opinion of the Revenue Commissioners, comprises a complete or substantially complete wireless reception and/or transmission set.	*ad valorem*	75 per cent. or £7 10s. 0d. the set whichever is, in each particular case, the greater.	50 per cent. or £5
	(2) An assembly of component part of wireless telegraphy apparatus not chargeable under (1) above which includes one or more of the following parts which is, or are, in the opinion of the Revenue Commissioners, complete or substantially complete, that is to say,	*ad valorem*	75 per cent. and an additional amount of	— 50 per cent.
	A loudspeaker		15s. in respect of each loudspeaker in the assembly.	10s.
	A transformer with a core wholly or partly of metal		7s. 6d. in respect of each transformer with a core wholly or partly of metal in the assembly.	5s.
	A transformer without a core wholly or partly of metal		3s. in respect of each transformer without a core wholly or partly of metal in the assembly.	2s.
	A coil (including a choke or a wire-wound resistance) with a core wholly or partly of metal.		7s. 6d. in respect of each coil (including a choke or a wire-wound resistance) with a core wholly or partly of metal in the assembly.	5s.
	A coil (including a choke or a wire-wound resistance) without a core wholly or partly of metal.		3s. in respect of each coil (including a choke or a wire-wound resistance) without a core wholly or partly of metal in the assembly.	2s.
	A condenser with movable vanes		7s. 6d. in respect of each condenser with movable vanes in the assembly.	5s.
	A cabinet or other like container		21s. in respect of each cabinet or other like container in the assembly.	14s.
266/2	(3) Any of the following parts of wireless telegraphy apparatus, which is, in the opinion of the Revenue Commissioners, complete or substantially complete, and is imported otherwise than as a part of an assembly, that is to say,	*ad valorem*	75 per cent. or an amount of	50 per cent. or
	A loudspeaker		15s. in respect of a loudspeaker.	10s.
	A transformer with a core wholly or partly of metal		7s. 6d. in respect of a transformer with a core wholly or partly of metal.	5s.
	A transformer without a core wholly or partly of metal		3s. in respect of a transformer without a core wholly or partly of metal.	2s.
	A coil (including a choke or a wire-wound resistance) with a core wholly or partly of metal.		7s. 6d. in respect of a coil (including a choke or a wire-wound resistance) with a core wholly or partly of metal.	5s.
	A coil (including a choke or a wire-wound resistance) without a core wholly or partly of metal.		3s. in respect of a coil (including a choke or a wire-wound resistance) without a core wholly or partly of metal.	2s.
	A condenser with movable vanes		7s. 6d. in respect of a condenser with movable vanes. Whichever is, in each particular case, the greater.	5s.
	(4) (*a*) A cabinet or other like container for wireless telegraphy apparatus which, in the opinion of the Revenue Commissioners, is complete or substantially complete and is not imported as part of an assembly.	*ad valorem*	75 per cent. or 21s. the cabinet whichever is, in each particular case, the greater.	50 per cent. or 14s.
	(*b*) A number of articles which, in the opinion of the Revenue Commissioners, consist collectively of a complete or substantially complete aggregate of parts for the assembly of a cabinet or other like container for wireless telegraphy apparatus.	*ad valorem*	75 per cent. or 21s. the aggregate, whichever is, in each particular case, the greater.	50 per cent. or 14s.
	(5) Component parts and accessories of wireless telegraphy apparatus not chargeable at any of the above headings, but excluding valves, dry batteries and battery plates.	*ad valorem*	75 per cent.	50 per cent.

The expression "wireless telegraphy apparatus" means apparatus for the transmission and reception or the transmission only or the reception only of messages or other communications by wireless telegraphy or wireless telephony.

The preferential rates shown are applicable to goods manufactured in and consigned from a country which is within the British Commonwealth of Nations.

Articles in respect of which the duty has been paid are admissible for drawback.

The Order also provides for the following exemptions from the duty :—

(1) Whenever an article chargeable with a duty of customs imposed by this Order—

(*a*) is imported by an institution or society which, in the opinion of the Revenue Commissioners, has for its primary object the amelioration of the lot of blind persons, and

(*b*) is shown, to the satisfaction of the Revenue Commissioners, to be intended for the use in the State of blind persons,

the Revenue Commissioners may, subject to compliance with such conditions (if any) as they may think fit to impose, permit such article to be so imported without payment of the said duty or repay any such duty paid on such importation.

(2) Whenever it is shown to the satisfaction of the Revenue Commissioners that any article chargeable with a duty of customs imposed by this Order is imported for use exclusively for the purpose of imparting or receiving instruction in wireless telegraphy in a school or college, they may, subject to compliance with such conditions (if any) as they may think fit to impose, permit such article to be imported without payment of the said duty or repay any such duty paid on such importation.

(3) Whenever it is shown, to the satisfaction of the Revenue Commissioners, that an article chargeable with a duty of Customs imposed by this order is imported for use or has been used or is being used exclusively for some purpose other than use as a component part or an accessory of wireless telegraphy apparatus, the Revenue Commissioners may, subject to compliance with such conditions (if any) as they may think fit to impose, permit the article to be imported without payment of the said duty or repay any such duty paid on such importation.

The Order also provides for importation under licence without payment of duty or at a reduced rate of duty, as the case may be.

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Venezuelan Customs Law

Attention was drawn in last week's *Board of Trade Journal* to difficulties that have arisen about the revision of the Venezuelan Customs Law. The Commercial Counsellor to H.M. Embassy at Caracas reports that difficulties still persist in operating "to order" shipments to Venezuela. Shippers, therefore, should await further advices on the matter. Meanwhile they can avail themselves of the provisions of Article 75 of Decree 156 (a summary of which appeared in the *Board of Trade Journal* for March 30, 1946), which provides for correction of documents of goods on high seas.

Jamaica

Tonnage Tax : The Board of Trade have received a copy of a notice which, in effect, extends until March 31, 1947, the provisions of the Tonnage Tax Law. (See *Board of Trade Journal* of June 20, 1942, and subsequent amending notices.)

Schedule II (exemptions from Tonnage Tax) has been amended to read as follows :—

(*a*) Animals.
(*b*) Articles being the produce and manufacture of the Cayman Islands.
(*c*) Articles grown, produced or manufactured in the Turks and Caicos Islands.
(*d*) Coal and coke.
(*e*) Condensed milk.
(*f*) Cutlasses, spades, shovels and agricultural forks.
(*g*) Fertilizers.
(*h*) Fuel oil in bulk.
(*i*) Iron, unmanufactured.
(*j*) Kerosene oil.
(*k*) Articles admitted under Item 2 of the Fourth Schedule of the Tariff.
(*l*) Materials and appliances for the treatment and control of plant diseases.
(*m*) Materials for packing and putting up articles produced or manufactured in this island.
(*n*) Railway and tramway material.
(*o*) Salt.
(*p*) Articles imported by or on behalf of the Government of the Island, or by or on behalf of the Imperial or any Dominion or Colonial Government, the Kingston and Saint Andrew Corporation, the Water Commission (Corporate Area) or a Parochial Board.

Restricted Importation of Fruits and Vegetables. The Board of Trade have received a copy of the Customs (Importation) (Prohibition) (Fruit and Vegetable) Proclamation, 1946, which prohibits, as from March 23, 1946, the importation into Jamaica from all countries of all fruits and vegetables (except dried or processed fruits and vegetables, grains, seeds and onions, including any species of "Allium"). This prohibition, however, does not apply to such fruits and vegetables as are imported from the United Kingdom and Ireland, Canada, New Zealand, the Bahamas, and the United States of America. Products from such countries must be accompanied by a certificate from a competent authority of the Government of the country of origin stating that the produce is home-grown, fresh, clean and free from diseases and pests, and, in the case of Irish potatoes imported from the United Kingdom and Ireland, Canada or the United States of America the certificate shall also state specifically that the potatoes are not infected by Wart Disease (*Synchytrium endobioticum*). The certificate shall state specifically that the Mediterranean Fruit fly (*Ceratitis capitata*) does not exist in the country of origin.

Importers of fruit or vegetables admitted under this Proclamation will notify the Director of Agriculture either prior to or within twenty-four hours of the arrival of the fruit or vegetables. All produce likewise admitted will be subject to inspection by an officer duly authorized by the Director of Agriculture. Upon being satisfied that any produce admitted under this Proclamation is infected with pests or disease, the Director of Agriculture is empowered to order any treatment to be applied to such produce with the object of destroying such pests or disease, or to order the destruction of such produce by and at the expense of the importer and thereby incur no liability to pay compensation for the destruction of such produce.

The Customs (Importation Prohibition) Fruit and Vegetable Proclamations, 1934 and 1935 are revoked.

Sierra Leone Customs Tariff Amendments

A SUPPLEMENT to the *Sierra Leone Royal Gazette* of May 14, 1946, contains a copy of the Customs Tariff (Amendment) Order in Council, 1946, which provides for the following amendments to the First and Second Schedules to the Sierra Leone Customs Tariff, effective from May 1, 1946 :—

FIRST SCHEDULE

(*a*) the provision relating to surtax is deleted (see *Board of Trade Journal* of March 14, 1940 (p. 289).

(*b*) The following tariff items have amended rates of duty :—

Item No.	Goods	Unit	British Preferential Tariff	General Tariff
			£ s. d.	£ s. d.
12	Beer and ale, stout and porter containing not more than 10 per centum by weight of pure alcohol	Imp. gall.	0 2 0	0 4 0
	former rates of duty	,, ,,	0 1 6	0 3 0
30	Cider and perry, containing not more than 10 per centum by weight of pure alcohol	,, ,,	0 2 0	0 4 0
	former rates of duty	,, ,,	0 1 6	0 3 0
	Note.— Any such liquor containing more than 10 per centum by weight of pure alcohol shall be charged duty as spirits. When cider or perry is imported, twelve bottles of the size known as reputed quarts, or twenty-four bottles of the size known as reputed pints, shall be deemed to contain two imperial gallons.			
40	(*a*) (iv) Cotton manufactures : Grey (excluding American grey commonly known as tent cloth) —admitted as such by the Comptroller of Customs	sq. yd.	0 0 1	0 0 2
	former rates of duty	,,	0 0 0¾	0 0 1½
40	(*a*) (v) Cotton manufactures : Printed—admitted as such by the Comptroller of Customs	sq. yd.	0 0 1½	0 0 3
	former rates of duty	,,	0 0 1¼	0 0 2½
70	Matches in boxes containing 80 matches or less. (Matches in boxes containing a greater quantity than 80 matches each to be charged in proportion)	Gross of boxes	0 3 0	0 5 0
	former rates of duty	,, ,, ,,	0 1 6	0 3 6
79	(*b*) Oil : Illuminating	Imp. gall. at 80° Fahr.	0 0 8	0 0 10
	former rates of duty	,, ,, ,,	0 0 7	0 0 9
79	(*d*) Oil : Motor Spirit	,, ,, ,,	0 9 0	0 1 0
	former rates of duty	,, ,, ,,	0 0 8	0 0 11
87	Silk and artificial silk : (*a*) Silk, artificial piece goods of a greater area than one-third of a square yard, including scarves, headkerchiefs, handkerchiefs, handkerchief mufflers, table covers, bed covers, shawls, sarongs, and any other articles of artificial silk or other synthetic fibres which are capable of being used in substitution for any such article and are in the opinion of the Comptroller of Customs likely to be so used	sq. yd.	0 0 3 or 16⅔ per cent. *ad val.*, whichever is the higher	0 0 9 or 50 per cent. *ad val.*, whichever is the higher
	former rates of duty	,,	0 0 2	0 0 9
	(*b*) Silk, artificial, fents, i.e. pieces under 6 yards in length	lb.	0 1 0 or 16⅔ per cent. *ad val.*, whichever is the higher	0 3 0 or 50 per cent. *ad val.*, whichever is the higher
	former rates of duty	,,	0 1 0	0 3 0
	(*c*) Silk, natural, piece goods	lb.	0 1 6 or 16⅔ per cent. *ad val.*, whichever is the higher	0 4 6 or 50 per cent. *ad val.*, whichever is the higher
	former rates of duty	,,	0 1 6	0 4 6
94	Tobacco : (i) Unmanufactured	lb.	0 2 0	0 2 3
	former rates of duty	,,	0 1 6	0 1 9
	(ii) Manufactured : (*a*) Cigars	lb.	0 8 0	0 10 2
	former rates of duty	,,	0 6 6	0 8 8
	(*b*) Cigarettes : 1. Not exceeding a weight of 4½ ozs. per 100 (1) Manufactured in the British Empire from Empire grown tobacco	per 100	0 2 6	—
	former rates of duty	,,	0 1 6	—
	(2) Manufactured in the British Empire from foreign tobacco	per 100	0 3 0	—
	former rates of duty	,,	0 2 0	—
	(3) Manufactured in foreign countries	per 100	—	0 3 6
	former rates of duty	,,	—	0 2 6
	2. Exceeding a weight of 4½ ozs. per 100 (1) Manufactured in the British Empire from Empire grown tobacco	lb.	0 10 0	—
	former rates of duty	,,	0 6 0	—
	(2) Manufactured in the British Empire from foreign grown tobacco	lb.	0 12 0	—
	former rates of duty	,,	0 8 0	—
	(3) Manufactured in foreign countries	lb.	—	0 14 0
	former rates of duty	,,	—	0 10 0
	Provided that with respect to cigarettes manufactured in the British Empire which contain a blend of Empire and foreign tobacco, the duty thereon shall be at a rate proportioned to the percentage of each tobacco, the percentage of Empire and foreign grown tobacco being charged respectively at the rates under 1 (1) and (2) and 2 (1) and (2).			
	(*c*) Snuff	lb.	0 7 0	0 8 0
	former rates of duty	,,	0 5 0	0 6 0

Item No.	Goods	Unit	British Preferential Tariff	General Tariff
			£ s. d.	£ s. d.
	(*d*) Other manufactured tobacco :			
	(1) Manufactured in the British Empire from Empire grown tobacco	lb.	0 6 0	—
	former rates of duty	,,	0 4 0	—
	(2) Manufactured in the British Empire from foreign grown tobacco	lb.	0 7 0	—
	former rates of duty	,,	0 5 0	—
	(3) Manufactured in foreign countries	lb.	—	0 8 0
	former rates of duty	,,	—	0 6 0
	Provided that with respect to tobacco manufactured in the British Empire which contains a blend of Empire and foreign tobacco, the duty thereon shall be at a rate proportional to the percentage of each tobacco, the percentage of Empire and foreign grown tobacco being charged respectively at the rates under (1) and (2).			
100	Wines :			
	(*a*) Sparkling	Imp. gall.	0 15 0	1 10 0
	former rates of duty	,,	0 5 0	0 10 0
	(*b*) Still (excluding sacramental wine)	Imp. gall.	0 5 0	0 10 0
	former rates of duty	,,	0 3 0	0 6 0
	Note.—Any such liquor containing more than 20 per centum by weight of pure alcohol shall be charged duty as spirits.			

(*c*) The alternative *ad valorem* rates of duty under items 5, 19(*a*), 19(*b*), 19(*d*), 19(*e*), 40(*i*), 59, 76, 95, 102 and 105 are deleted and the following rates substituted in lieu thereof :—

16⅔ per cent. for 16 per cent., 33⅓ per cent. for 32 per cent. and 50 per cent. for 48 per cent.

(*d*) The following items are deleted :—

14, 40(*b*), 40(*c*), 41 and 72.

(*e*) The following items are amended to read as follows :—

Item No.	Goods	Unit	British Preferential Tariff	General Tariff
			£ s. d.	£ s. d.
38	Cordage and twine :			
	(*a*) Cordage other than cotton	100 lb.	0 8 0	0 16 0
89	Spirits containing more than 2 per cent. by weight of pure alcohol :			
	(A) Potable :			
	Brandy, gin, rum, and other potable spirits	Imp. gall.	2 7 6	2 10 0
	(B) Not potable :			
	(i) Spirituous drugs and medicinal preparations, containing more than 20 per centum by weight of pure alcohol and not specifically exempted under the Second Schedule...	Imp. gall.	2 7 6	2 10 0
	(ii) (*a*) Methylated Spirit, when the Comptroller of Customs is satisfied that the spirit is intended solely for industrial, medical, or scientific purposes and is not intended for sale	Imp. gall.	0 1 0	0 1 3
	(*b*) Methylated Spirit, other	,,	2 7 6	2 8 8
	(iii) Perfumed toilet preparations, washes and dentrifices	Imp. gall.	2 7 6	3 4 3
	(iv) Other	,,	0 1 0	0 1 3
	Any liquor containing not more than two per centum by weight of pure alcohol shall be deemed to be non-alcoholic.			
	When spirits are imported in cases of twelve bottles of the size known as reputed quarts, or twenty-four bottles of the size known as reputed pints, each case shall be deemed to contain two imperial gallons.			

(*f*) The following items are inserted :—

Item No.	Goods	Unit	British Preferential Tariff	General Tariff
			£ s. d.	£ s. d.
31	Cinematograph films	100 ft.	0 0 6	0 1 0
	Provided that no Customs duty shall be charged on the importation into Sierra Leone of any cinematograph film of an educational character which is certified by the Board of Control appointed under the Cinematograph Exhibition Ordinance, 1931, to be of such character.			
40	Cotton Manufactures :			
	(*b*) Cordage	100 lb.	Free	0 8 0
	(*c*) Interlock Fabric—admitted as such by the Comptroller of Customs :			
	(i) Bleached	lb.	0 0 2	0 0 4
	(ii) Unbleached	lb.	0 0 2	0 0 4
	(iii) Dyed	lb.	0 0 3	0 0 6

SECOND SCHEDULE

(*a*) The following items are deleted :—

3B, 3C, 19, 39 and 46.

(*b*) The following items are inserted :—

3C. Articles imported by the British Council which the Comptroller of Customs is satisfied are for the use of the British Council, or for the benefit of the community or for presentation to local societies, but not including articles for re-sale or for the personal use of members of the said Council.

29A. Medicines and drugs included in the British Pharmacopoeia or the British Pharmaceutical Codex and such other medical preparations, drugs and surgical dressings as may be accepted by the Comptroller of Customs.

Malayan Union Customs Tariff Modifications

The Board of Trade have received information that the import customs duties on the following items have been amended, as from May 27, 1946, to read as follows :—

Description of Goods	Rates of Duty		
	Unit	Full duty	Preferential duty
		$ c	$ c
I.—Intoxicating liquors :—			
(a) Rectified Spirit	Per proof gallon	42 00	—
former rates of duty ...	" " "	21 00	—
(b) Brandy and any other intoxicating liquor not hereinafter provided for	" " "	42 00	35 00
former rates of duty ...	" " "	21 00	17 50
(c) Brandy in bottle and accepted by the Proper Officer of Customs as not exceeding 81 per cent. of proof spirit...	Per gallon	35 00	30 00
former rates of duty ...	" "	17 50	15 00
(d) Whisky, rum and gin	Per proof gallon	42 00	—
former rates of duty ...	" " "	21 00	—
(e) Whisky, rum and gin in bottle and accepted by the Proper Officer of Customs as not exceeding 81 per cent. of proof spirit	Per gallon	30 00	—
former rates of duty ...	" "	15 00	—
(g) Bitters and liqueurs not exceeding 100 per cent. proof spirit ...	" "	42 00	—
former rates of duty ...	" "	21 00	—
(h) Sparkling wines not exceeding 42 per cent proof spirit	Per gallon	32 00	24 00
former rate of duty ...	" "	16 00	12 00
(i) Still wines exceeding 26 per cent. but not exceeding 42 per cent. of proof spirit	" "	16 00	12 00
former rates of duty ...	" "	8 00	6 00
(j) Still wines not exceeding 26 per cent. of proof spirit	" "	8 00	6 00
former rates of duty ...	" "	4 00	3 00
(k) Ale, beer, stout, porter, cider and perry	" "	2 80	2 40
former rates of duty ...	" "	2 10	1 80
II.—Tobacco :			
(a) Cigars and snuff	Per pound	7 00	6 00
former rates of duty ...	" "	3 50	3 00
(b) Cigarettes	" "	3 50	3 00
former rates of duty ...	" "	1 75	1 50
(c) Unmanufactured tobacco	" "	2 70	2 50
former rates of duty ...	" "	1 35	1 25
(d) (i)Manufactured tobacco (excluding cigars, cigarettes and snuff) imported in containers of any kind for retail sale to the public...	" "	3 50	3 30
former rates of duty ...	" "	1 75	1 65
(ii) Not otherwise provided for	" "	3 00	—
former rates of duty ...	" "	1 50	—
XI.—Cosmetics and perfumery	*ad valorem*	50%	25%
former rates of duty ...	" "	25%	free

Duty free Imports into Penang Island.—As from June 1, 1946, all goods entering the Island are imported free of duty with the following exceptions :—

(*a*) Intoxicating liquors.
(*b*) Tobacco.
(*c*) Petroleum, including Kerosene and Kerosene substitutes.

New Zealand

Import Licensing. Tenth Period : The Board of Trade have received information from H.M. Trade Commissioner, Wellington, that the following amendments have been made to the Import Licensing Schedule for the 1946 period (see also *Board of Trade Journal* of June 8, 1946, page 741).

Tariff Items.

Ex. 239 — *Squash Rackets.* The importation of squash racquets may be permitted under licences issued in respect of sporting requisites, N.E.I.

Ex. 258 — *Sensitized surfaces, and Albuminized paper, etc. (excluding those for X-ray work, for the use of professional photographers, etc.)* The allocation for imports of these goods from "Other British" countries has been increased from 100 per cent. of 1945 licences to 50 per cent. of the value of the applicant's imports of such goods from the same source in 1938.

Ex. 295 — *Paper unprinted, viz. glazed transparent greaseproof paper, greaseproof imitation parchment and similar paper.* The allocation for imports of greaseproof paper has been changed to 150 per cent. of 1943 licences from all sources, licences to be available from any source.

Ex. 338 (2) and (4) — *Fixed carbon resistors of 1 watt and ½ watt capacity.* The importation of these articles will now be permitted under licences granted under the general headings of switchboards, fuse boards, etc., ex item 338 (2)—and parts for radio receiving sets ex item 338 (4).

Ex. 436 — *Nets and Netting, N.E.I. (excluding fishing nets).* The allocation for imports of nets and netting, N.E.I. (excluding fishing nets) from the United Kingdom has been increased from 100 per cent. to 200 per cent. of the value of licences granted for imports of such goods from that source in 1945.

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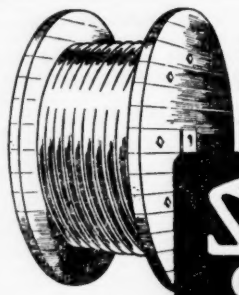

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Forthcoming Exhibitions and Fairs

The Autumn Royal Netherland Industries Fair will be held in Utrecht from September 10 to 19, 1946. The Fair will be international in character and exhibits by United Kingdom manufacturers will be accepted. Further information is obtainable from the Koninklijke Nederlandsche Jaarbeurs, Utrecht, Holland.

British Industries Fair, May 1947
London (Olympia and Earls Court). Organized by the Export Promotion Department, Board of Trade, 35 Old Queen Street, London, S.W.1.

Engineering and Hardware Section, Castle Bromwich, Birmingham. Organized by the Birmingham Chamber of Commerce (under the auspices of the Export Promotion Department, Board of Trade),95 New Street, Birmingham,2.

Forms of application for space and full details will be issued as soon as they are available.

Other United Kingdom Fairs

Corsetry, Underwear, etc., Exhibition
Porchester Hall, London, July 23-25. Apply to "Corsetry and Underwear Journal," 11d Regent Street, London. (Tel.: Abbey 6853.)

Public Lighting Apparatus and Equipment Exhibition
Central Hall, Westminster, London, S.W.1. September 10-12, 1946. Apply to the Municipal Agency Ltd., 68 Victoria Street, Westminster, S.W.1.

"Britain Can Make It" Exhibition
Victoria and Albert Museum, South Kensington. The Exhibition will open on September 24, 1946. Apply to the Council of Industrial Design, Tilbury House, Petty France, London, S.W.1. (Tel.: Whitehall 6322.)

Medical Exhibition, London
New Royal Horticultural Hall, Westminster, November 18-22, 1946. Apply to British and Colonial Druggist, Ltd., 194-200 Bishopsgate, London, E.C.3. (Tel.: Bishopsgate 2148.)

The Company of Shipwrights Exhibition
January 28-February 8, 1947, at The Royal Horticultural Hall, Westminster, S.W.1. Apply to the Chairman, Exhibition Committee, The Worshipful Company of Shipwrights, 3 Lloyds Avenue, London, E.C.3. (Tel.: Royal 4226.)

Oversea

Bordeaux Trade Fair
June 23-July 8. Apply to Mr. Charles Cowie, 5 Hillcrest Gardens, Hinchley Wood. Esher, Surrey.

Scandinavian Dental Congress and Exhibition, Copenhagen
July 3-6. Apply to the Exhibition Section, Scandinavian Dental Congress, 1946, Tandlege Otto Magnussen, Ostergrade 4, Kobenhavn, Denmark.

Industrial Fair, Lille
July 14-29. Apply to Foire de Internationale, 69 Rue Faidherbe, Lille, France.

Malayan Agricultural Show, Kaula Lumpur
August 3-5. Apply to the Agent for Malaya, Malaya House, 57 Trafalgar Square, London, W.C.2.

Twelfth International Building Exhibition, Brussels
August 3-18, 1946. Apply to the Organizer, Mon. Delcour, 302 rue Royale, Brussels. Belgium.

Royal National Agricultural and Industrial Association Exhibition, Brisbane, Australia
August 10-17, 1946. Apply to the above-named Association.

International Automobile Exhibition, Paris
August 3-October 13. Apply to Commissaire-Generale, Grande Palais, Champs de Elysees, Paris.

International Fur and Leather Fair, Basle
September 2-8. Apply to Manager, International Fur and Leather Fair, Basle. Switzerland.

International Samples Fair, Milan
September 12-27, 1946. Apply to the Secretary-General, Milan Fair via Domodossola, Milan, Italy.

International Commercial Fair, Marseilles
September 14-30. Apply to Comitede Direction, 36 Cannebiere, Marseilles, France.

Prague International Fair
September 15-22, 1946. Apply to the Secretary, The Czechoslovak Economic Association, 64 Great Cumberland Place, London, W.1. (Tel.: Ambassador 1801.)

Information has been received that special arrangements regarding hotel accommodation, travel by air and rail and free visa, have been made for the convenience of exhibitors and visitors to the fair. Full particulars obtainable from the Czechoslovak Economic Association, 64 Great Cumberland Place, London, W.1.

International Rebuilding Exhibition, Italy
May 30-October 27, 1946. To be held in the following cities:—Milan, Turin, Genoa, Florence, Rome, Naples and Venice. Apply to General Management, International Rebuilding Exhibition, 10 Corso Roma, Milan.

International Publicity Exhibition, Paris
October 1-November 15. Apply to Commissaire-Generale, 27 Bis Avenue de Villers, Paris (17).

International Aeronautical Exhibition, Paris
November 15-December 1. Apply to Commissaire-Generale. 4 Rue Galilee, Paris (16e).

Royal Adelaide Exhibition
Wayville, South Australia, at Centennial Hall and Grounds, Wayville, March 21 to May 17, 1947. Apply to South Australian Chamber of Manufactures, Inc., Pirie Street, Adelaide, Australia.

NOTE.—*No responsibility is accepted with regard to the standing of any firms, companies or individuals mentioned.*

While the utmost care has been taken in the compilation of this list, it will be understood that the dates given are those decided upon by the organisers concerned and may be subject to alteration.

The list is not intended to include all forthcoming Exhibitions and Fairs throughout the world, but only to cover some of the more important ones and those likely to be of interest to British manufacturers. Information regarding Exhibitions and Fairs other than those mentioned above may be obtained on application to the Export Promotion Department (Exhibitions and Fairs Branch), 35 Old Queen Street, London, S.W.1. (Tel.: Victoria 9040.)

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British Chambers of Commerce Overseas

Argentina.—British Chamber of Commerce for the Argentine Republic (Inc.), Calle Bme. Mitre 441 (6 Piso), Buenos Aires.
British Chamber of Commerce in Rosario (affiliated to the above), British Consulate, Rosario.

Belgium.—British Chamber of Commerce in Belgium, 204 Rue Royale, Bruxelles.

Brazil.—British Chamber of Commerce in Brazil (Inc.), Rua Visconde de Inhauma No. 91, 2°, Caixa Postal 56, Rio de Janeiro. (Telegraphic address: "Chambrit, Riojaneiro.")
(Representatives in London.—Association of British Chambers of Commerce, 14 Queen Anne's Gate, Westminster, S.W.1.)
British Chamber of Commerce of Sao Paulo and Southern Brazil, Rua Barao de Paranapiacaba, 64, 3 Andar, Caixa, "Postal, 1621." Sao Paulo, Brazil. (Telegraphic address: "Britchamb, Sao Paulo.")

Chile.—British Chamber of Commerce in the Republic of Chile (Inc.), Calle Bandera 227 (Piso 4°), Casilla 4087, Santiago.
P.S.N.C. Building Calle Blanco 689, P.O. Box 1676, Valparaiso.

China.—The British Chamber of Commerce, 27 The Bund, Shanghai.

Cuba.—British Chamber of Commerce in the Republic of Cuba, Apartado 2642, Havana.

Denmark.—Honorary correspondents for Denmark of the Association of British Chambers of Commerce: British Import Union, Raadhuspladsen 45 (Absalonsgaard). (Telegraphic address "Britunion.")

Dominican Republic.—British Chamber of Commerce, Apartado 602, Ciudad Trujillo.

Egypt.—British Chamber of Commerce of Egypt, 1 Rue Centrale, Alexandria; 5 Sharia Boursa el Gedida (P.O.B. 79) Cairo, and P.O.B. 65, Port Said.
(Agents in the United Kingdom.—The Manchester Chamber of Commerce, Ship Canal House, King Street, Manchester.)

France.—British Chamber of Commerce in Paris, 6 Rue Halevy, Paris.

Iraq.—British Chamber of Commerce in Iraq, Rashid Street, Bagdad.

Mexico.—Central British Chamber of Commerce, San Juan De Letran 21 (office 713), Mexico, D.F.

Netherlands East Indies.—London Office.—Cecil Chambers, 86 Strand, London, W.C.2.

Peru.—British Chamber of Commerce, Edificio "La Nacional" 402, Ayacucho 309, Casilla 1913, Lima.

Portugal.—British Chamber of Commerce in Portugal (Inc.), 4 Rue Victor Cordon, Lisbon. (Telegraphic address: "Britcham, Lisbon.")
Branches.—6 Rua dos Clerigos, Oporto.
13A Rue 5 de Junha, Funchal, Madeira.

Spain.—Paseo de Gracia 11, Letra A, Barcelona, and Avenida de Jose Antonio 31—G22, Madrid.
Canary Islands.—Santa Catalina Mole, Puerto de la Luz, P.O. Box 72, Las Palmas.
Tangier (International Zone) and Spanish Zone of Morocco.—British Chamber of Commerce, Peninsular House, Tangier.

Switzerland.—British Chamber of Commerce in Switzerland (Inc.), 21 St. Jakobstrasse, Basle.
Branch.—3 Place St. Francois, Lausanne.

Tunis.—British Chamber of Commerce in Tunis, 35 Rue de Marseille, Tunis.

Turkey.—British Chamber of Commerce of Turkey (Inc.), 1 Istanbul Hani, Istanbul. (Postal address, Boite Postale 1190, Istanbul.)

United States of America.—British Empire Chamber of Commerce in the United States of America, 587 Fifth Avenue, 7th Floor, New York City.

Uruguay.—British Chamber of Commerce in Uruguay, Calle Piedras, 357 (2° Piso), Montevideo.

N.B.—Some of these Chambers, which are established in the interest of British Trade, issue a Journal periodically or an Annual Report, which may be inspected at the Export Promotion Department, 35 Old Queen Street, London, S.W.1.

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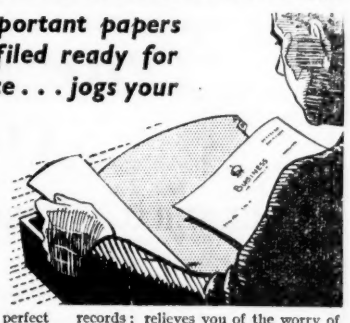

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Statutory Notice

Patents and Designs Acts, 1907 to 1946

Proceedings under Section 24 of the Acts : "*Licences of Right.*" The following Patents were indorsed "*Licences of Right*" on June 17, 1946 :—

No. of Patent	Grantee	Subject Matter
456128	Alfred Herbert Ltd. ...	Hardening of metal surfaces.
477277	Alfred Herbert Ltd. ...	Hardening of metal surfaces.
477284	Alfred Herbert Ltd. ...	Burners for use in hardening metal surfaces
547614	Alfred Herbert Ltd. ...	Systems for supply of carburetted air.
547615	Alfred Herbert Ltd. ...	Systems for supply of carburetted air.
501583	Premier Electric Heaters Ltd.	Cut outs.
521555	Richardson T.C. ...	A.C. electric meters.
540345	Baxters (Bolts, Screws & Rivets) Ltd.	Machines for setting or driving rivets.
540347	Baxters (Bolts, Screws & Rivets) Ltd.	Machines for setting or driving rivets.
540348	Baxters (Bolts, Screws & Rivets) Ltd.	Machines for setting or driving rivets.
544545	E. Paillard & Cie S.A.	Automatic control of pick-up arm.
553499	The English Electric Co. Ltd.	Winding gears for mines.

Any person alleging that indorsement of any of the above-mentioned patents has been made contrary to some contract in which he is interested may make application for the cancellation of the indorsement by lodging Patents Form No. 21 stamped £2 at the Patent Office, 25, Southampton Buildings, London, W.C.2.

H. L. SAUNDERS,
Comptroller-General.

The Patent Office.

Publications Received

Water-Power Resources of Canada (Bulletin No. 2177). The Dominion Water and Power Bureau, Surveys and Engineering Branch, Department of Mines and Resources of Canada, has issued its annual review of the water-power resources of Canada, under date of March 15, 1946. This review supplies information in condensed form on the total available and developed water power in each province, the provincial distribution of water power, and progress in its development and utilization in the wartime and ordinary industrial activities of the Dominion. The review also gives information in regard to the growth of water-power development in Canada, the capital invested in industry, and the coal equivalent of developed water power.

Copies of this review may be obtained free of charge on application to the Controller, Dominion Water and Power Bureau, Department of Mines and Resources, Ottawa.

The Estimator (Ninth Edition). Published by William Sessions, Ltd., The Ebor Press, York. Price 7s. 6d. net (leather bound, 10s.).

Bulletin of the Imperial Institute, Vol. XLIV., No. 1 (January-March, 1946). Published by the Imperial Institute, South Kensington, London, S.W.7. Price 2s. 6d. net, by post 2s. 9d. (Annual subscription, including postage, 10s.).

A record of progress relating to agricultural, mineral and other industries, with special reference to the utilization of the raw materials of the Dominions, India, and the Colonies.

The British Stocking Industry : Report of the Delegation to the United States of America and Canada, 1946. Copies can be obtained on application to The British Silk Stockings Corporation Limited, 104 Regent Road, Leicester ; price 10s., post free.

Foreign Exchange Control Board, Ottawa : *Report to the Minister of Finance*, March 1946.

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